Table of Contents

Introduction

Welcome to the PRISM 2007 Software Tutorial Library. This site provides the reviewer with individual tutorial sessions for the PRISM 2007 Software. The tutorial modules are interactive and dynamic.

To enter a module, select and click the (+) symbol located to the left of the Parent Level Module (Stand Alone). The Parent Level Module (Stand Alone) will expand to show you the individual subject areas contained within the Tutorial Library. Select an individual subject area and click to open that file. Within the individual subject area you may select subject area tutorials (e.g. Completing the PRISM Protocol in the Software includes the following tutorial modules: Assigning Items to Other Team Members; Adding Notes; Answering the Compliance Questions; and Creating a Finding).

To view a tutorial, select the "See It" button located at the top of your screen. You are now able to view the tutorial module. You will be asked to hit the enter key to advance through the frames of each module. You may also select the continue button to advance through the module. Follow the instructions provided within each screen to advance forward in the module.

We will continue to add modules to this Tutorial Library and will update modules as necessary.
If you have any questions about the PRISM 2007 Software, please contact the PRISM Help Desk at 1-800-518-1932.

Thank you

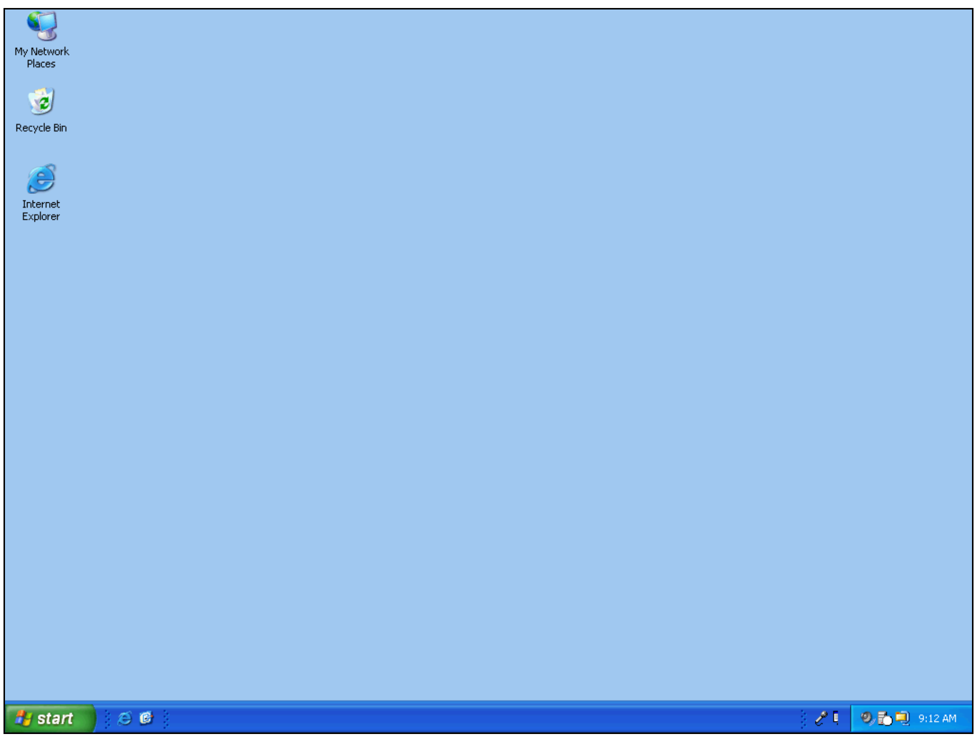
Downloading and Installing PRISM 2007 Software

Downloading and Installing for the First Time

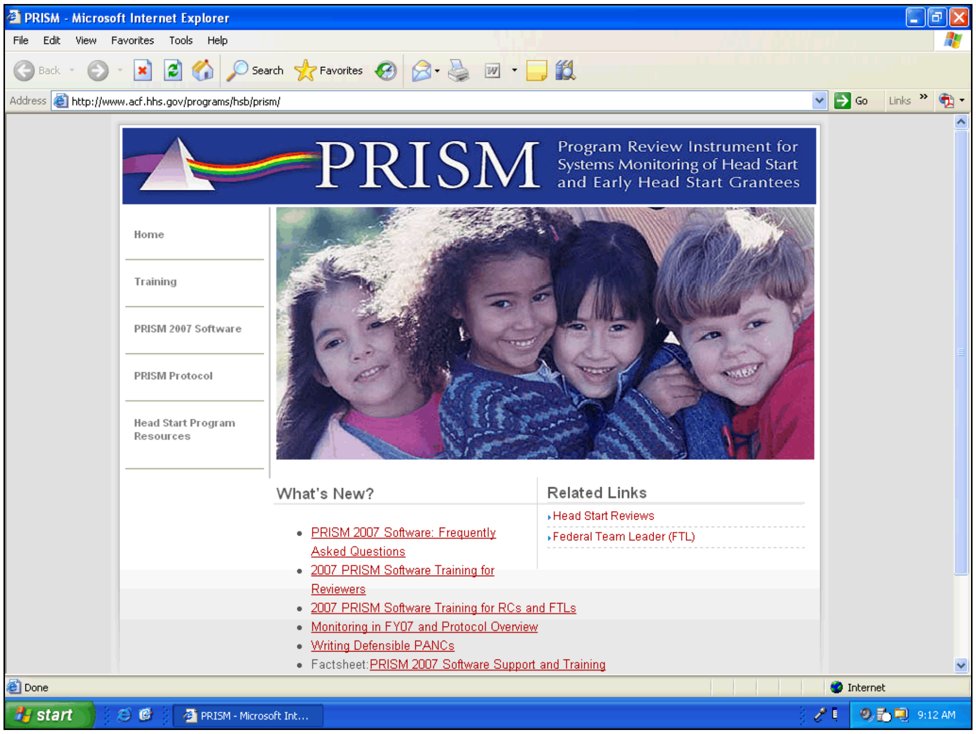
Procedure

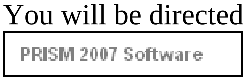
This tutorial provides guidance for installing the PRISM 2007 Software on a computer that does not currently have PRISM software installed. If your computer has a previous version of PRISM Software installed on it you should refer to the Synchronization Tutorial for guidance on updating your software to the most recent version.

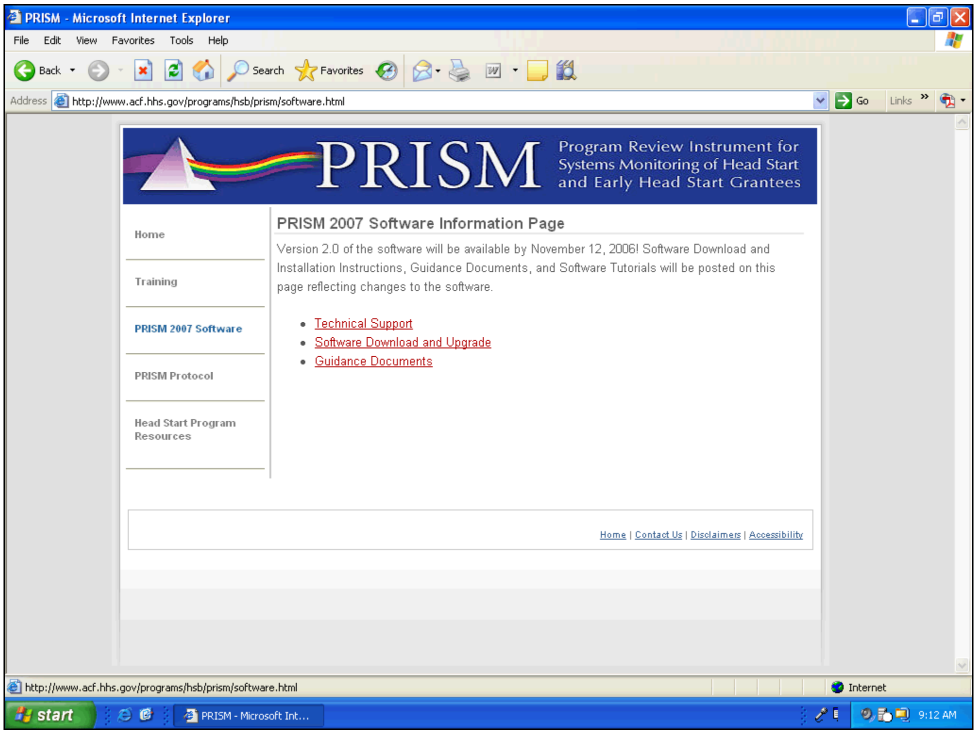
You must be connected to the Internet to download the current version of the PRISM 2007 Software. If you are using a dial up connection, please contact the PRISM Help Desk at 1-800-518-1932 for further assistance.



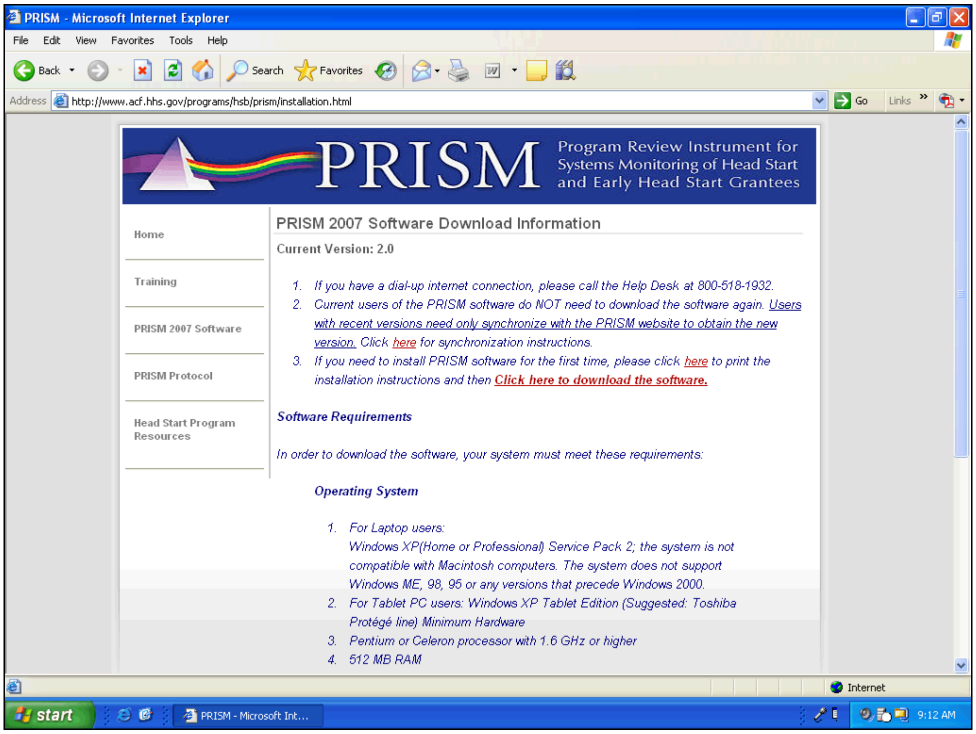
Step	Action
1.	Double-click the Internet Explorer icon located on your desktop to launch Internet Explorer.



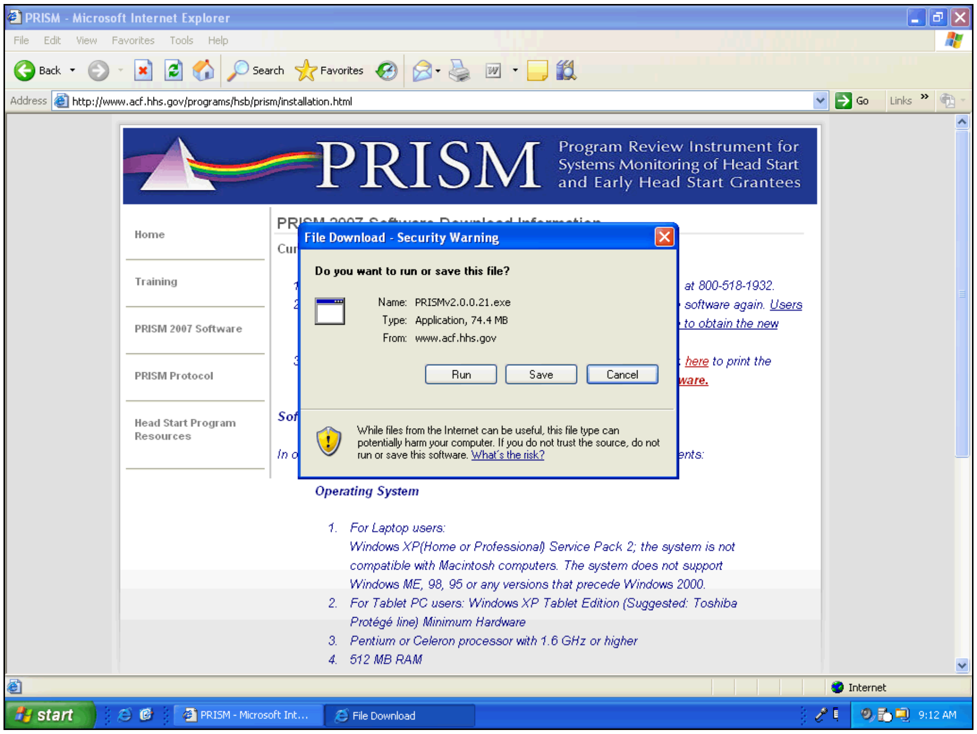
Step	Action
2.	Once you are at the PRISM homepage (www.acf.hhs/gov/programs/hsb/prism/), click the **PRISM 2007 Software** link on the left-hand side bar. You will be directed to the Software Information page. 

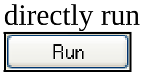


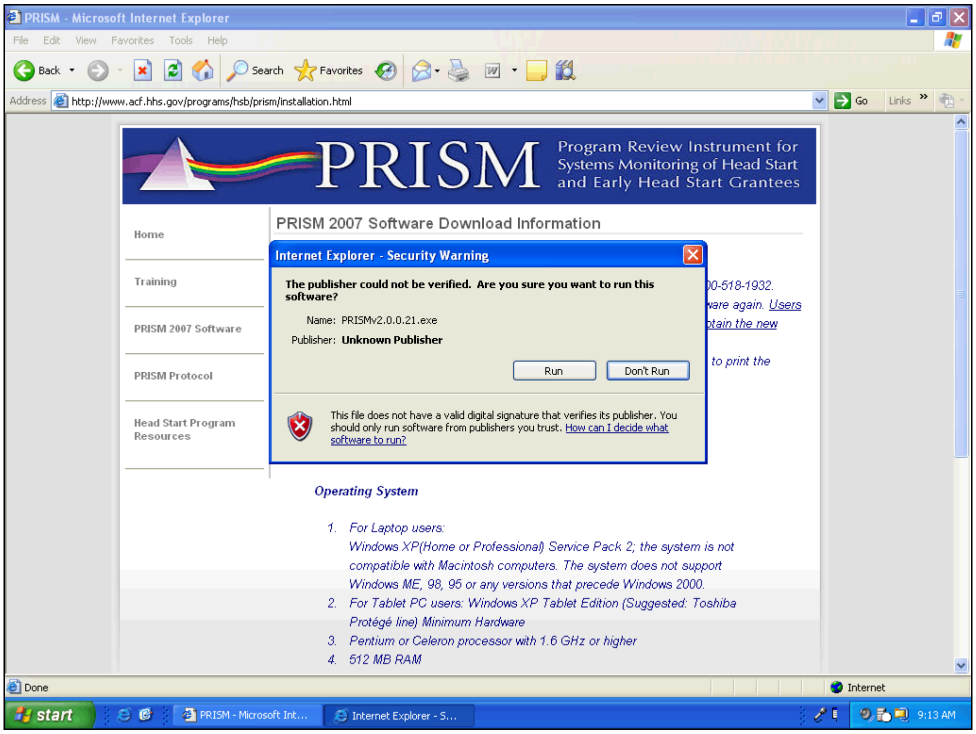
Step	Action
3.	Click the **Software Download and Upgrade** link to be directed to the download and install directions page. Software Download and Upgrade

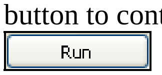


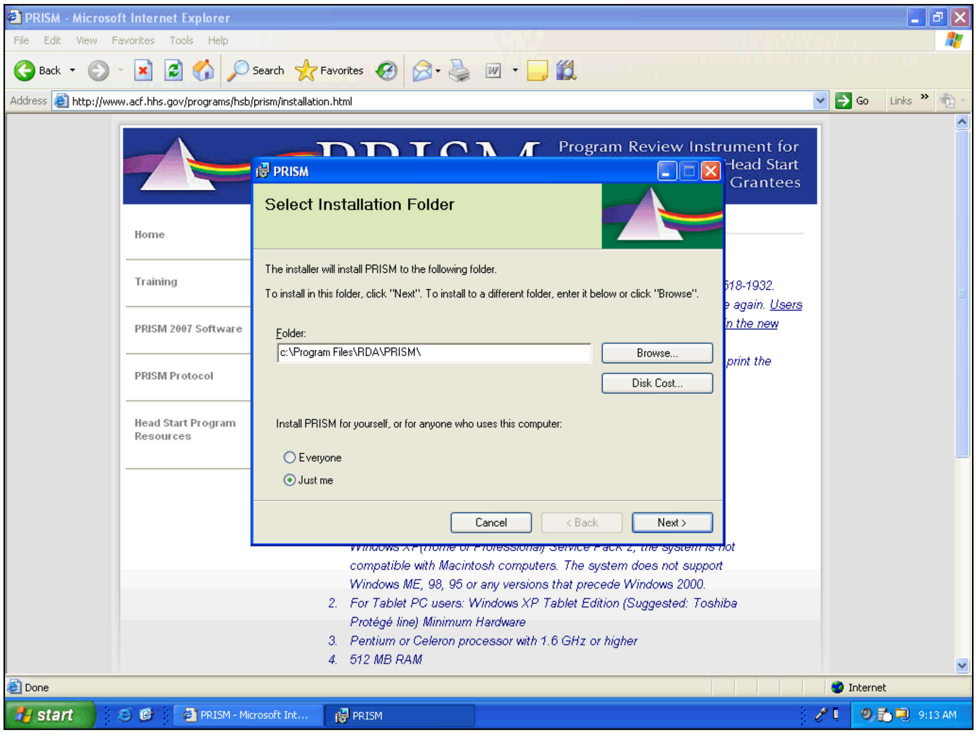
Step	Action
4.	Within the PRISM 2007 Software Download Information page click the **Click here to download the software** link to initiate the download of the PRISM 2007 Software. *Click here to download the software.*

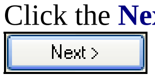
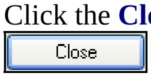


Step	**Action**
5.	A File Download Security Warning window will appear. Click the **Run** button to directly run the install process. 
	or Press **[Alt+R]**.

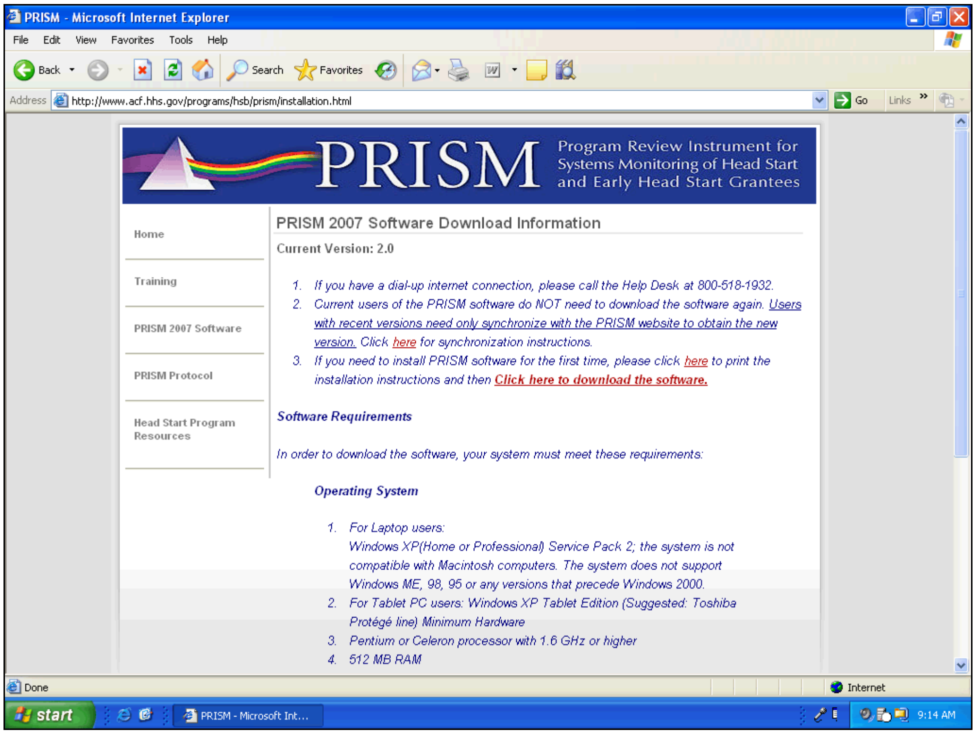


Step	Action
6.	An Internet Explorer Security Warning window will appear. This warning asks you to confirm that you do wish to install this application on your computer. Click the **Run** button to continue the install process. 
	or Press **[Alt+R]**.
7.	During the install process Windows will begin to unzip and extract the necessary files to install the PRISM 2007 Software unto your computer. This process may take a few minutes. **Do not press cancel during this process.**
8.	After Windows has extracted the files necessary for installing the software unto your computer, Windows will begin the install of these files. A status bar will display to show you the progress of the installation.

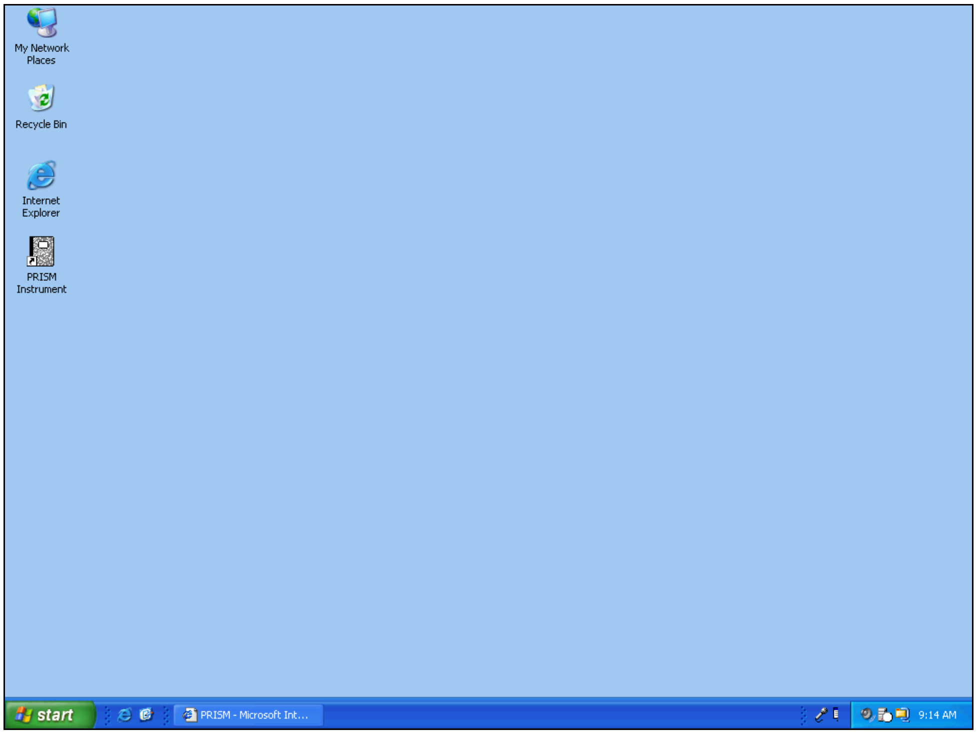


Step	Action
9.	Windows will automatically install the necessary files onto your computer. **Important:** Select "Everyone" to enable the software to be available to everyone who uses your computer. Click the Everyone option. 
	or Press **[Alt+E]**.
10.	Click the **Next >** button. 
	or Press **[Alt+N]**.
11.	Click the **Next >** button. Installation may take a few minutes. Do not click the cancel button during the installation process. 
	or Press **[Alt+N]**.
12.	Once you have downloaded the PRISM 2007 Software to your computer you will receive a final Installation Complete window message indicating a successful install. PRISM 2007 has been successfully installed onto your computer!
13.	Click the **Close** button button to end. 

Step	Action
	or Press **[Alt+C]**.



Step	Action
14.	Click the **Minimize** button to see your desktop. 



Step	Action
15.	Notice that the PRISM 2007 Software icon (labeled "**PRISM Instrument**") will be present on your desktop. This marble-notebook icon indicates the software has been installed on your computer. Clicking on this shortcut to the software will launch the **PRISM 2007 Stand Alone Software**.
16.	**End of Procedure.**

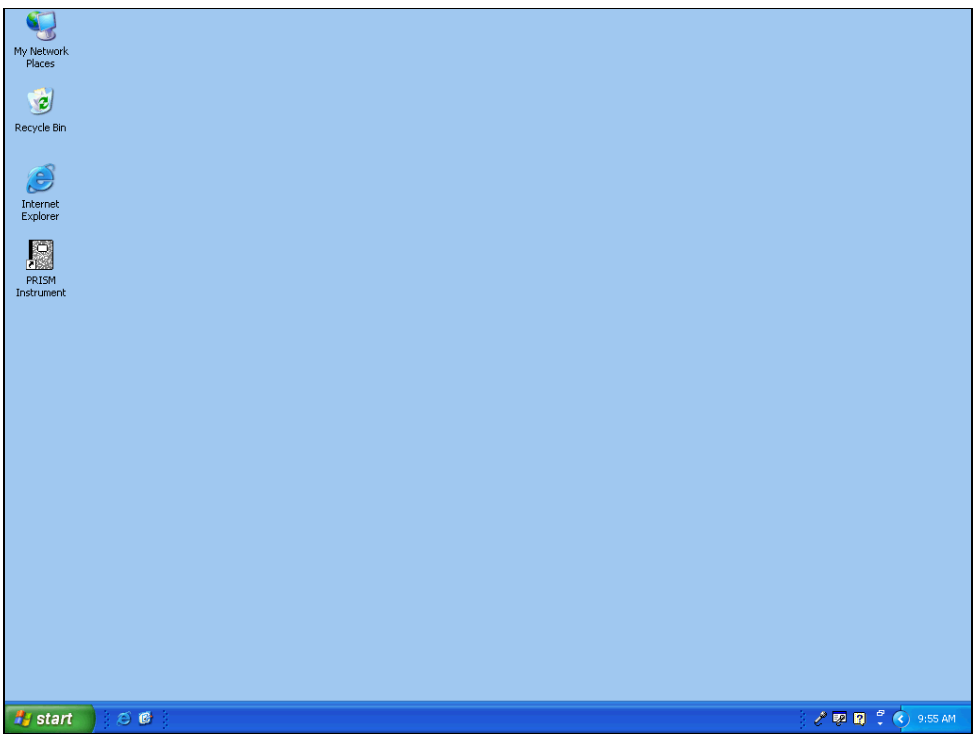
Logging On, Synchronizing to Download a Review

Logging On and Synchronizing to Download a Review

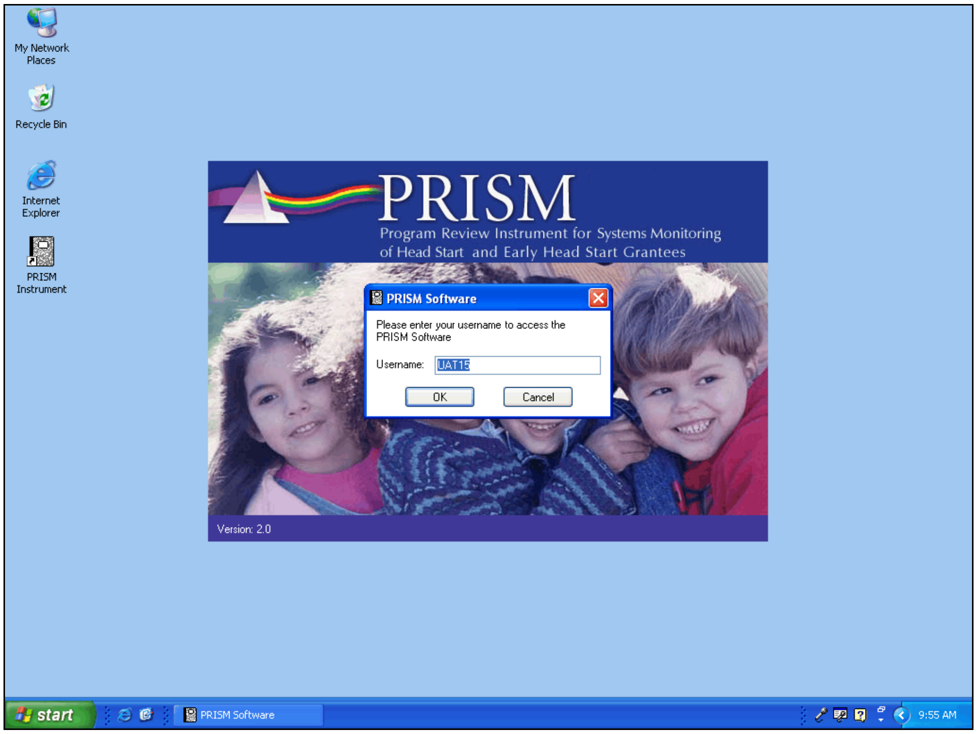
Procedure

To access your reviews you must synchronize with the PRISM Website. This tutorial provides guidance in logging on to the PRISM 2007 Stand Alone and synchronizing with the Website to receive your reviews. To do this, you must have an active internet connection.

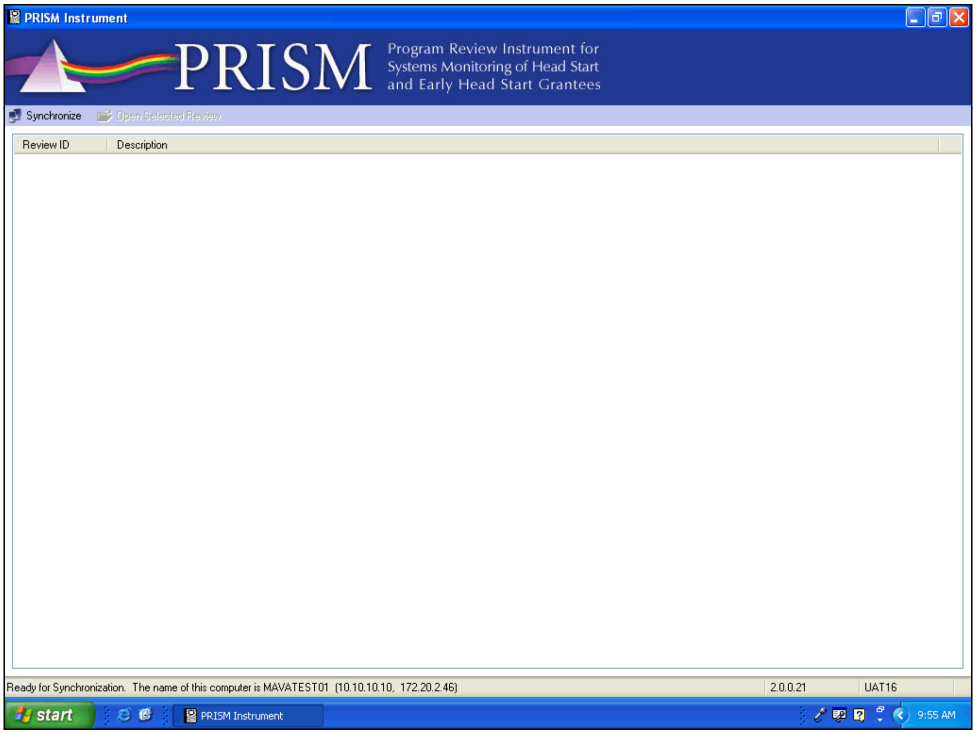
(**Note:** You may also synchronize with another computer that has the review on it that you want to download. To synchronize with another computer you will need to connect to that computer using a router. Contact the PRISM Help Desk at 1-800-518-1932 for assistance with computer to computer synchronization using a router.)

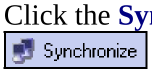


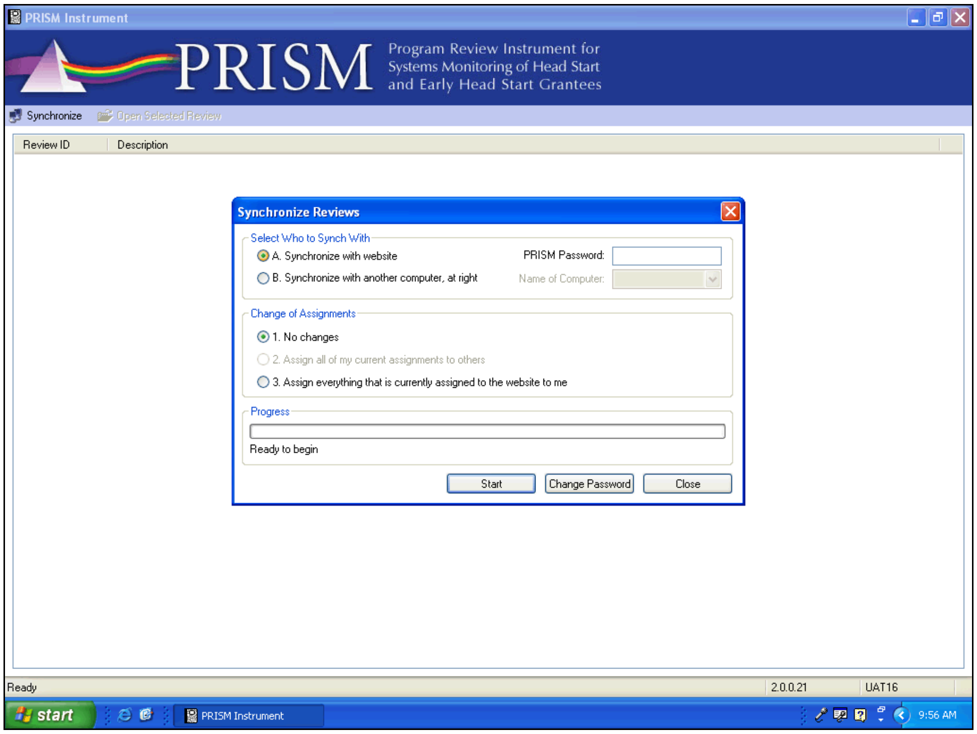
Step	Action
1.	Locate the PRISM Software marble-notebook icon on your desktop. Double-click the PRISM icon to initiate the synchronization process.

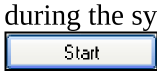


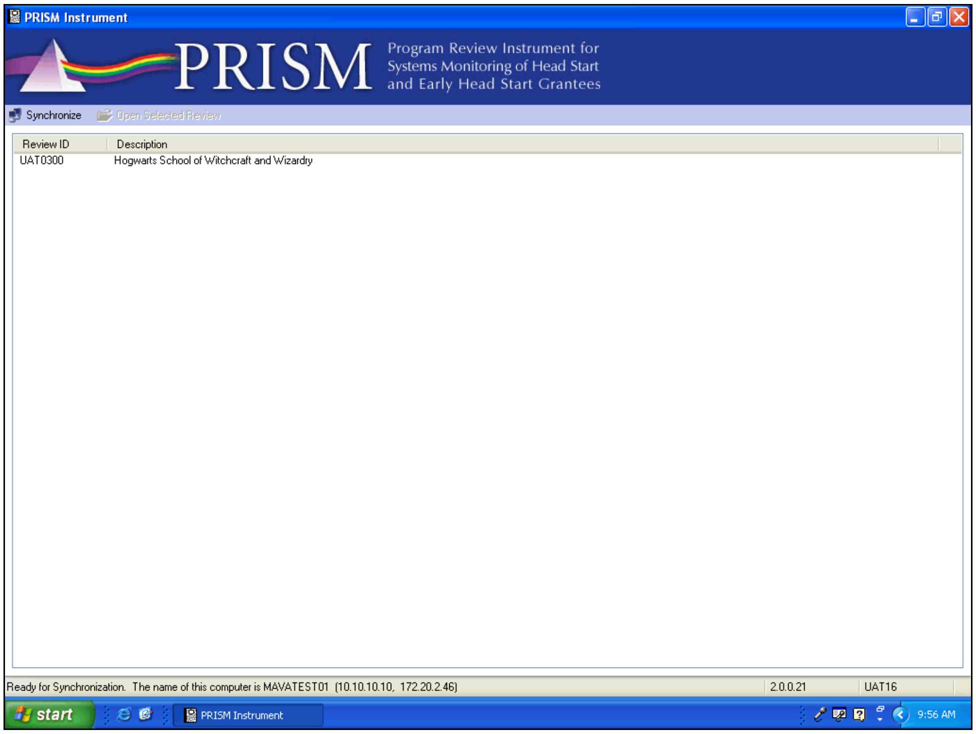
Step	Action
2.	A PRISM Software User Log In window will appear. You must enter your Danya assigned User Id in the Username field. If this is the first time you are using the software, your user name will be the username you use to log onto the www.heasdstartreviews.com website. If you have used PRISM in the past but cannot remember your username or password, please contact the PRISM Help Desk at 1-800-518-1932 for assistance. In our example, we have entered the username "**UAT16**".
3.	Click the **OK** object to enter the synchronization process. 

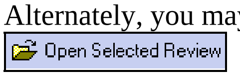


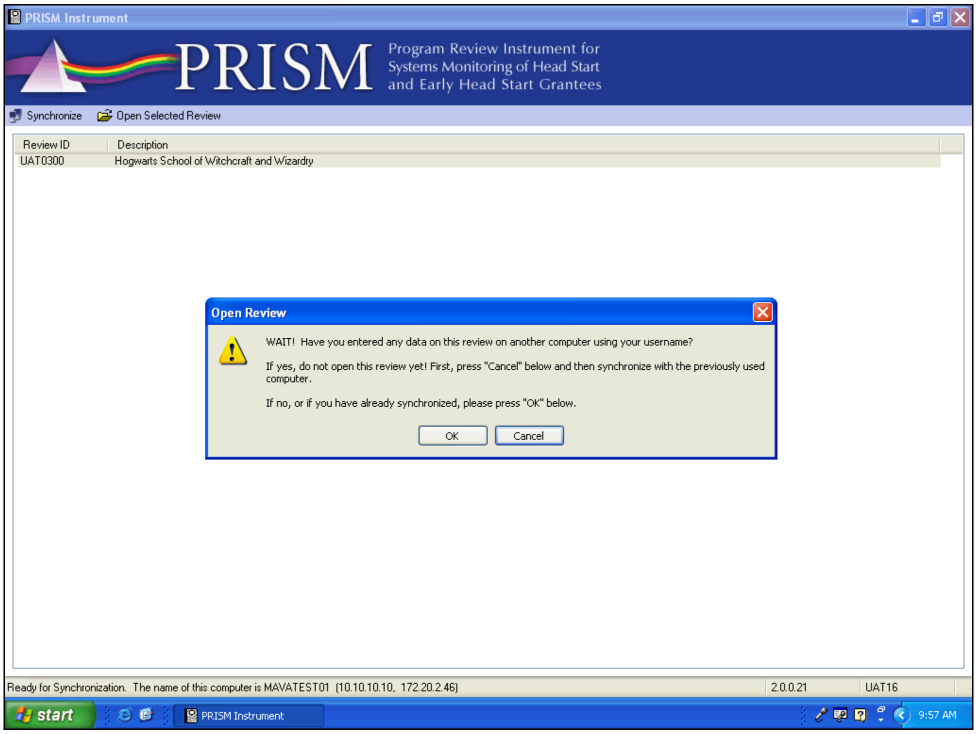
Step	Action
4.	Until you have downloaded your review the **Select Review ID** page will remain empty. Click the **Synchronize** button to continue the synchronization process. 

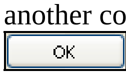


Step	Action
5.	A **Synchronize Reviews** window will appear. Select option **A -- Synchronize with Website**. Enter your **PRISM Password** in the **Password field**. If you have forgotten you password, please contact the PRISM Help Desk for assistance. If this is the first time you are using the PRISM Software, your password will be the same as your USERNAME that you use to access the www.headstartreviews.com website. We will use "**Albus**" in this tutorial as an example.
6.	Under Change of Assignments, select option **3. Assign everything that is currently assigned to the website to me.** 
7.	Click the **Start** button. Synchronization with the web will now begin. Synchronization progress will be displayed under the progress bar. Do not attempt to close this window during the synchronization process. 
8.	This is synchronization in progess.
9.	Once synchronization process has completed, the PRISM Synchronize window will display your current reviews. Confirm the review ID and Name and click to select and highlight the review. The **Open Selected Review Button** in the menu bar above will now become active.



Step	Action
10.	Click the **Hogwarts School of Witchcraft and Wizardry** review.
11.	Click the **Open Selected Review** button. Alternately, you may double click the Review ID to automatically open the review. 



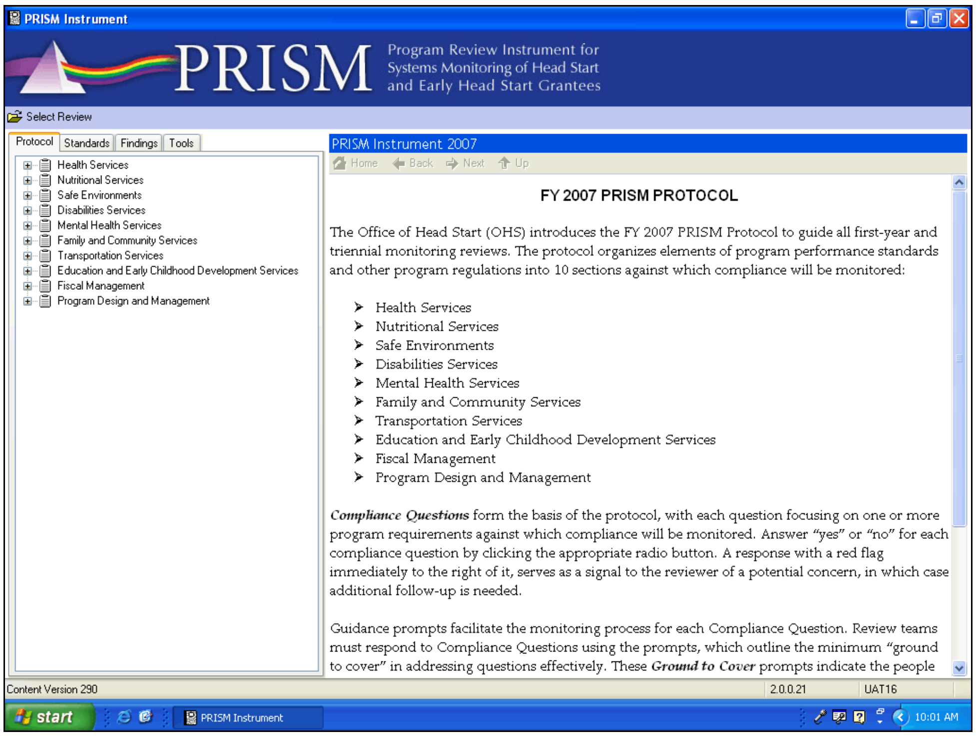
Step	Action
12.	A warning window will appear. If this is the first time you have synchronized with the Web to receive the review, you may ignore this warning and proceed by clicking OK. **Please note**: This warning is important. It asks you confirm before you open the review on this computer, that you have not logged onto a different computer using your username and entered entered information on this review. If you have used another computer with your username you must first synchronize the other computer to the Web to return the review data/information you've entered in the Stand Alone back to the Web. Click the **OK** button if you are certain that you have not synchronized previously on another computer during this review. 
13.	You have successfully synchronized and your review will open in the new PRISM 2007 software.
14.	**End of Procedure.**

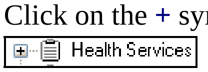
Navigating in the Software

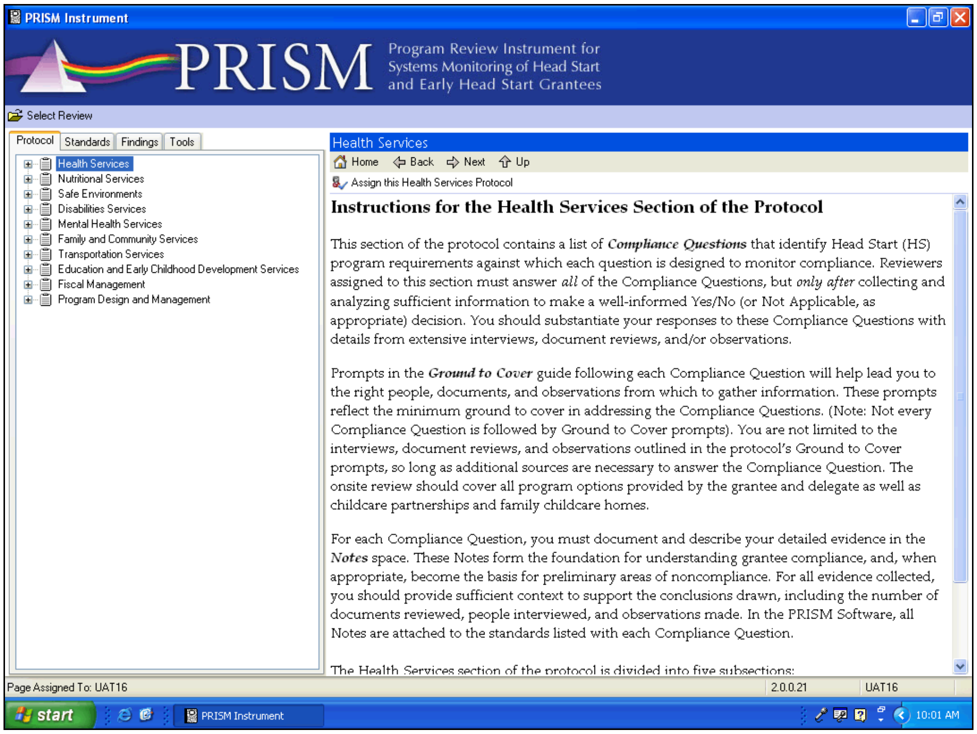
Procedure

The following tutorial will provide you guidance for navigating through the PRISM 2007 software. You may also view the PRISM 2007 Software Webinar or Power Point Presentation for a step by step depiction of elements of PRISM 2007. You can find that information at: http://www.acf.hhs.gov/programs/hsb/prism/.

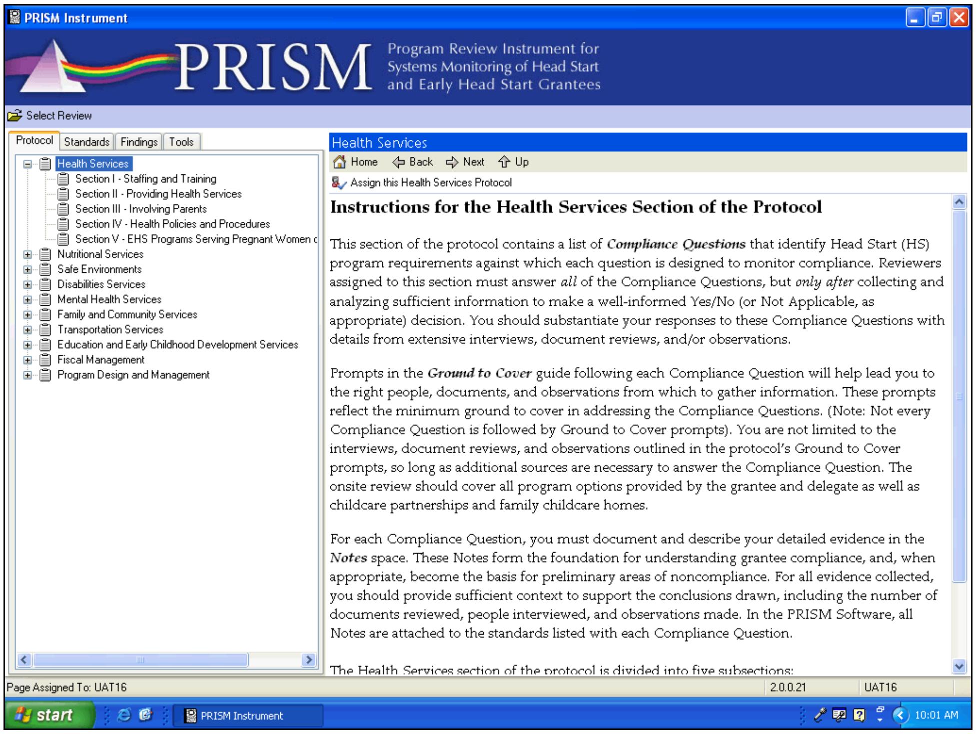
PRISM 2007 is the electronic version of the paper protocol. The Protocol, standards and checklists are clearly displayed in the software.

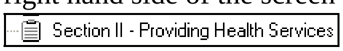
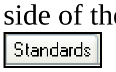


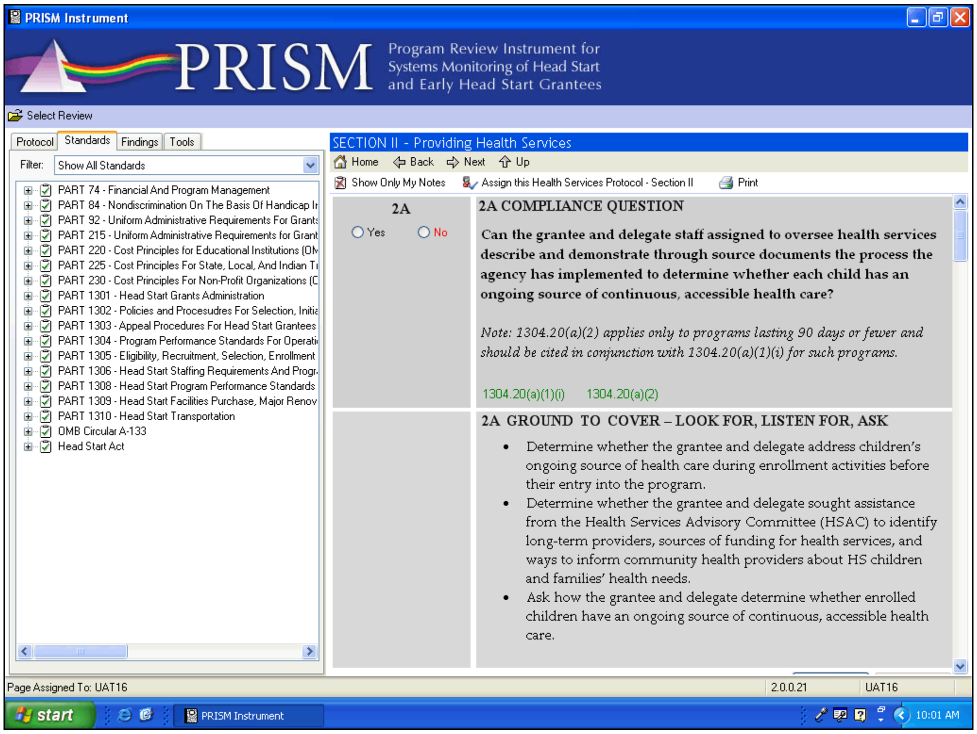
Step	Action
1.	Once you have opened a review, you will be taken to the **PRISM 2007 Home Page**. This page is the introduction to the 2007 PRISM Protocol. While navigating through the software you may select the Home button to return to this page. In this example we will navigate through the tabs on the left hand side on the protocol page and select the first Protocol Section, Health Services. Click on the **+** symbol located to the left of the Section title. 



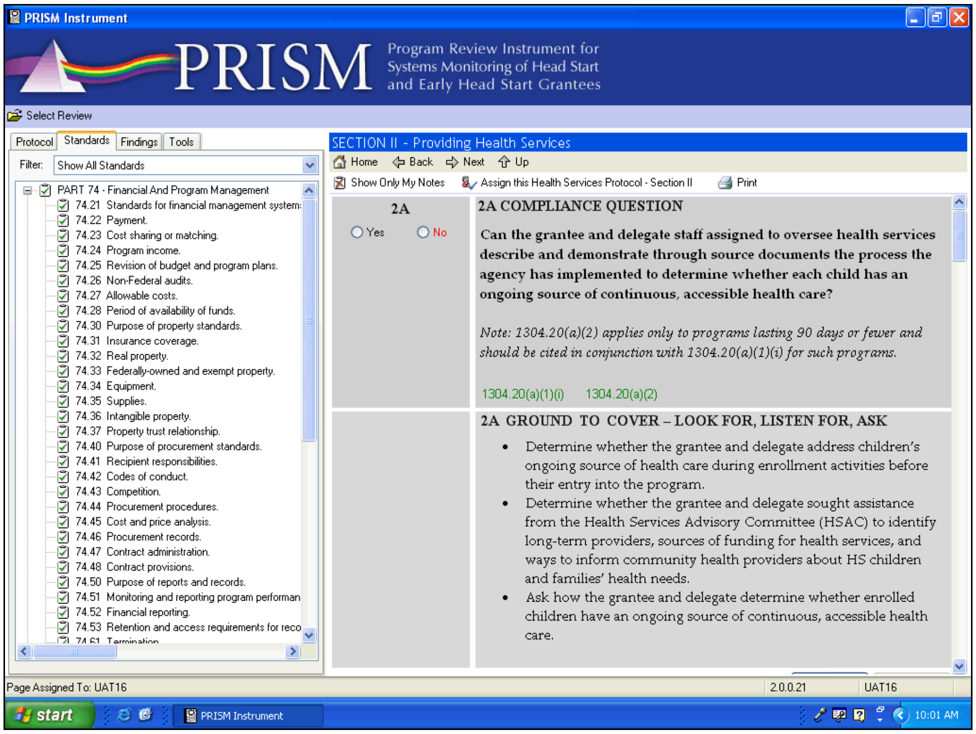
Step	Action
2.	The subsections of the **Health Services Section** of the protocol are located within this tree. Click the **+** button to to open the tree and see all Health Services subsections. 

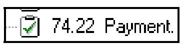


Step	Action
3.	Click the **Subsection Title** to see it appear on the right-hand side. Alternatively, you may select the **Subsection** link within the Instructions page on the right hand side of the screen to be automatically directed to that subsection. 
4.	To view the standards, select the **Standards Tab** on the left hand side of the PRISM 2007 Protocol screen. Click to open the standards tab. The standards will display in this tab. By selecting a standard and double clicking it you can view the text of the standard on the right hand side of the screen. 



Step	Action
5.	Within the **Standards Tab** you have the option to filter standards by Section. Select the section of the protocol for which you wish to see associated standards under the **Filter** drop down menu. You may also **Show All Standards** from the filter drop down menu. Click the **+** button. 



Step	Action
6.	Click the **+** button to select a standard and double click on it to display the text of the standard on the right hand side of the PRISM 2007 Software screen. 
7.	The **Findings Tab** will display any findings that have been created during the review process. This window will remain empty until findings have been created. Click the **Findings Tab** to display your findings. 
8.	The **Tools Tab** contains the worksheets and checklists that are utilized during the review. Under this tab you will find the **Protocol and Observation Worksheets** and the **Age and Income Eligibility** and **Delegate Checklists**. The Report Coordinator and Team Leader Checklists are also available under this tab. Checklists and worksheets should be completed according to the instructions provided within the protocol. Click the **Tools Tab** to display the checklists and worksheets. 

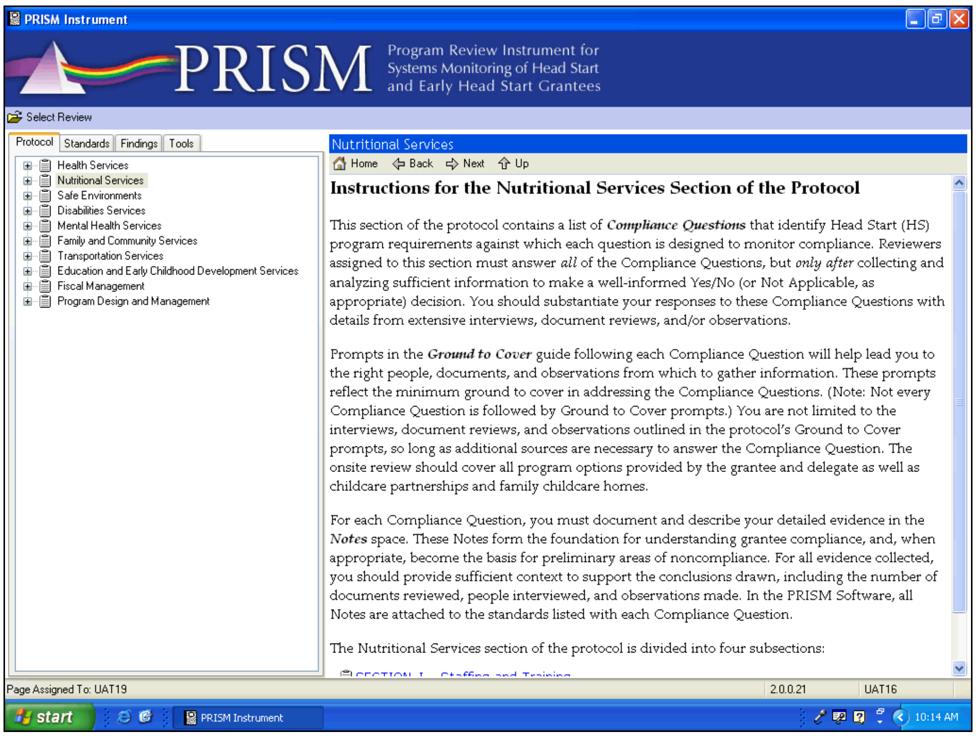
Step	Action
9.	The **Protocol Worksheet** is an optional worksheet that allows the reviewer to enter in information and notes during a review. The information entered on this worksheet can be copied and pasted into a **New Notes** window. This worksheet can be used as a worksheet to capture information that might or might not be included in the final report. To include information from this worksheet elsewhere in the software, you must copy and paste from the notes within the **Protocol Worksheet** to another area (New Note) in the software. Several Protocol Worksheets can be created by one reviewer. Please remember, this is an optional worksheet. 
10.	Selecting the **Home** button will automatically take you back to the Introduction to the PRISM 2007 Protocol Home page. 
11.	You may navigate to the Home page from anywhere in the software by selecting the Home button at any time.
12.	**End of Procedure.**

Completing the PRISM Protocol in the Software

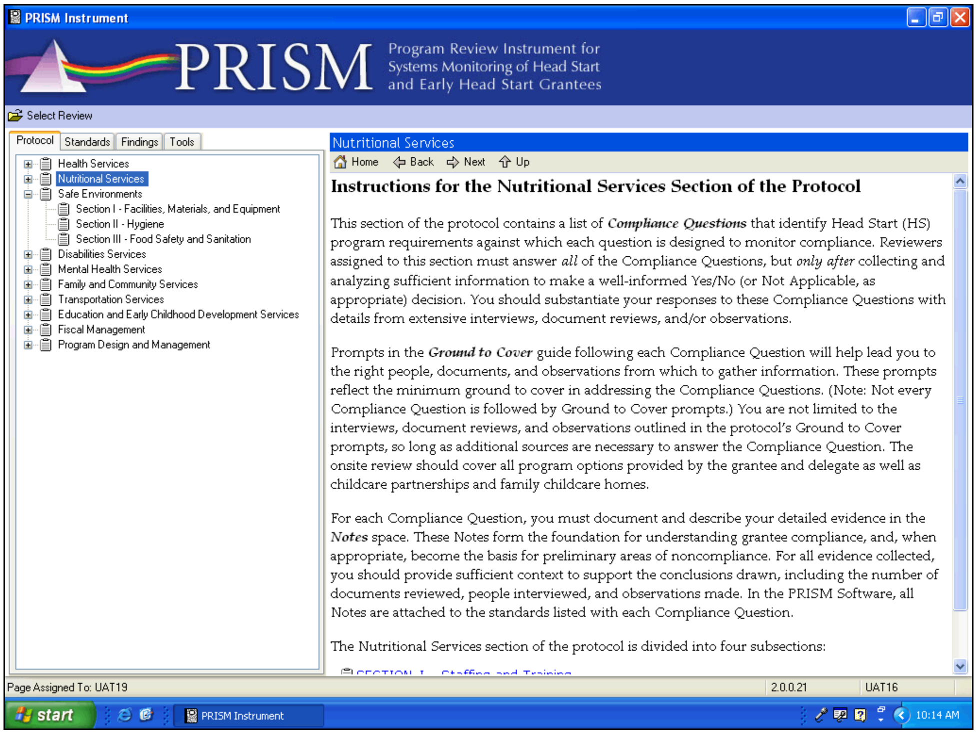
Assigning Items to Other Team Members

Procedure

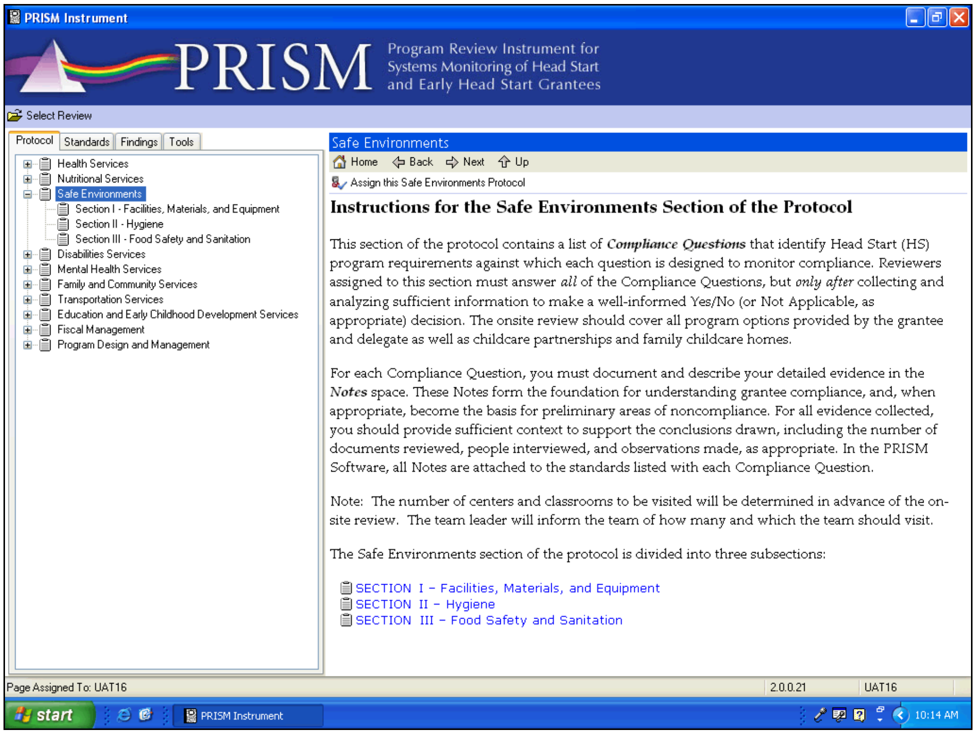
Sections of the Protocol can be assigned at the Section level as well as at the subsection level. The following tutorial provides guidance in assigning sections and subsections of the Protocol.



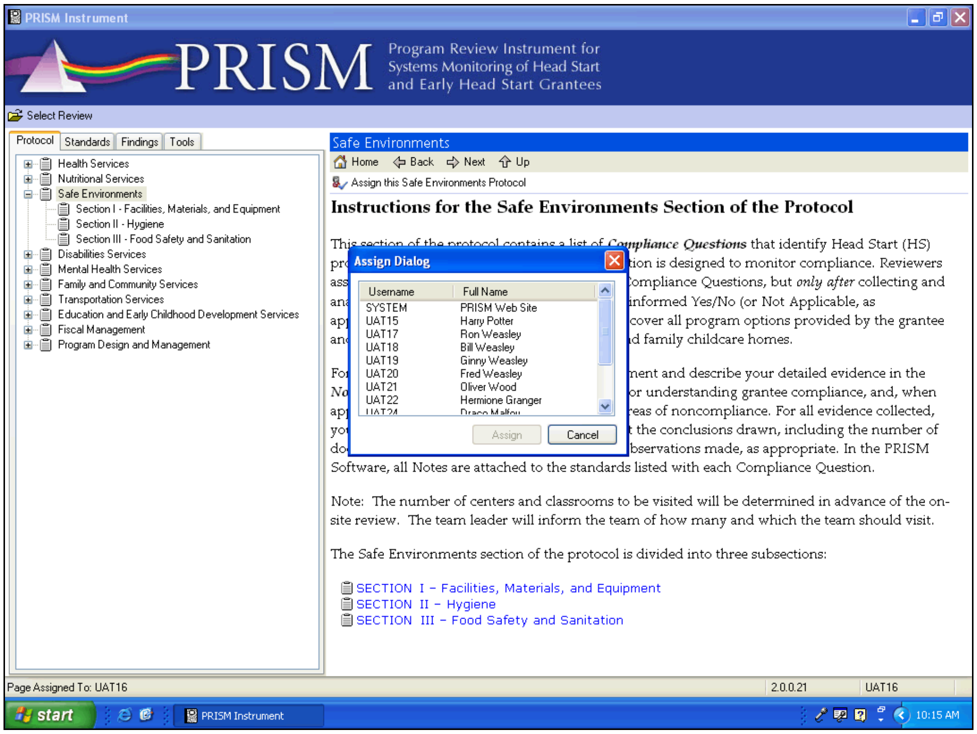
Step	Action
1.	In the Protocol Tab section, select a section of the Protocol. In our following example we have selected Nutritional Services. Click on the **Plus** button to expand the Section tree. 



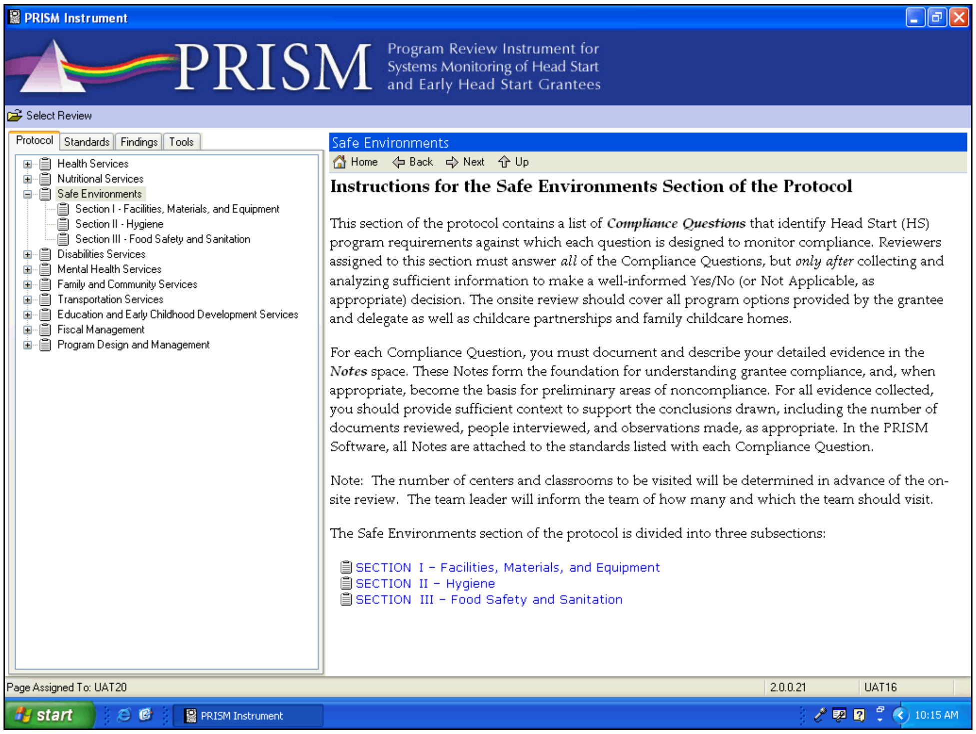
Step	Action
2.	Select the **Section Title** you wish to assign and click it to open. In this example we have selected **Safe Environments Section** of the Protocol. 



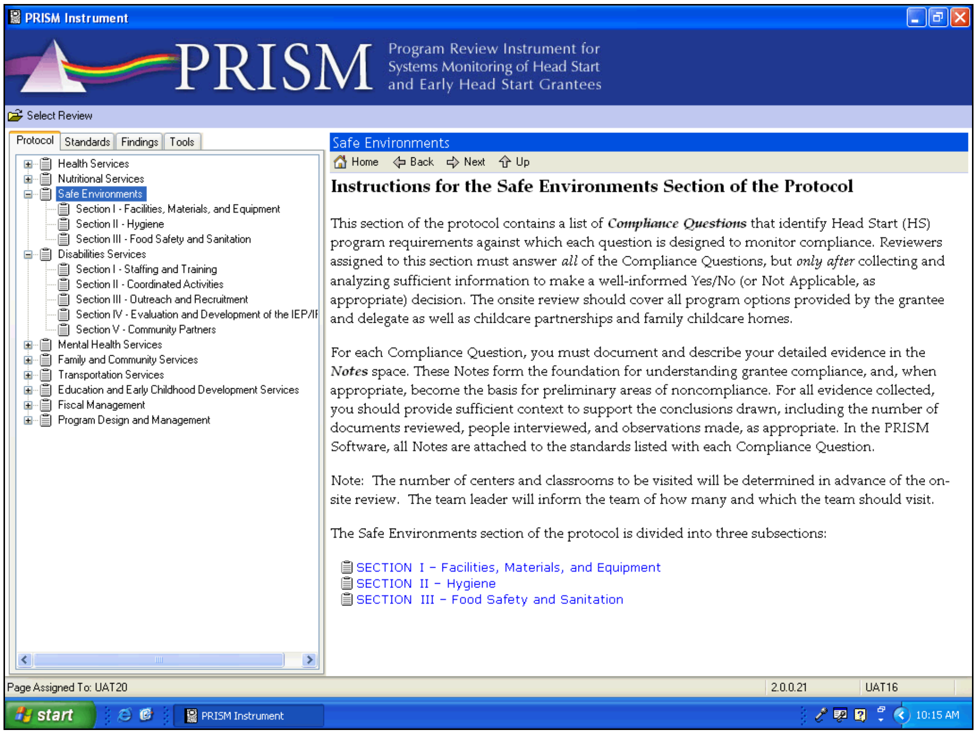
Step	Action
3.	The Instructions for the Safe Environments Section of the Protocol will be displayed on the right hand side of the screen. To assign this section and the instructions, select the **Assign this Safe Environments Protocol** button. 

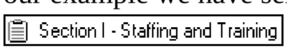


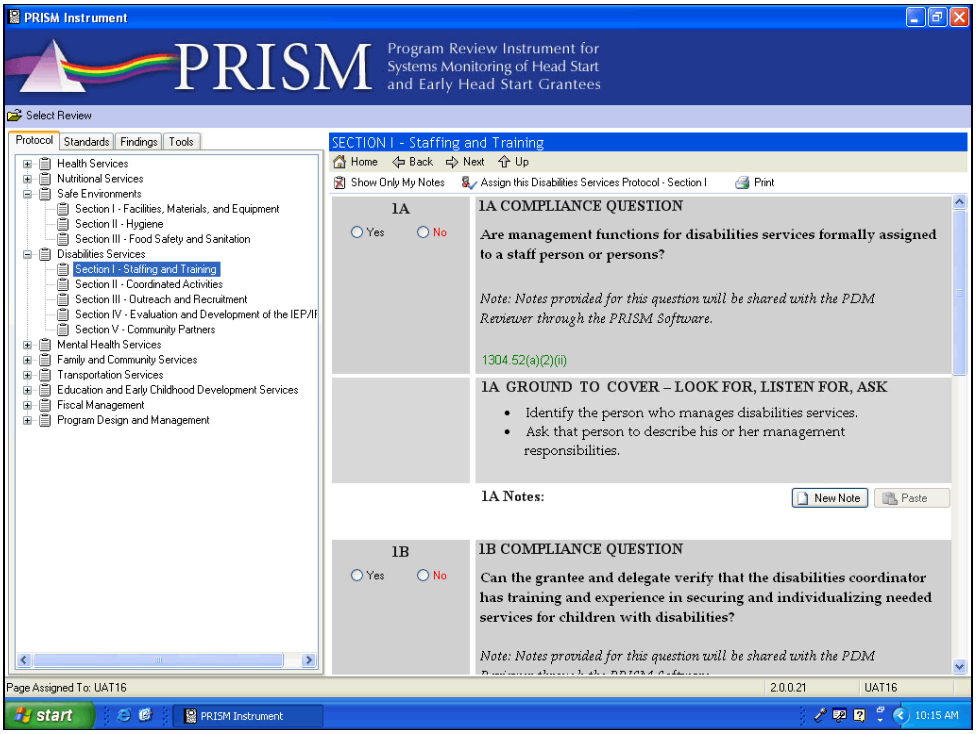
Step	Action
4.	Once you click the **Assign this Safe Environments Protocol** button, a dialog box will appear. Reviewer usernames will appear in this drop down box. Highlight and select the reviewer to whom you wish to assign the section. In our example we have assigned the Safe Environments Section of the Protocol to **Fred Weasley** (username **UAT20**). 
5.	Click the **Assign** button. **Reminder:** Taking this action is the equivalent of addressing the envelope of a letter you would like to send. But until you mail the envelope, the recipient will not receive it. Likewise, in order for the person to receive this assignment, you and the person to whom you assigned the item must synchronize. Go to the Select Review page to synchronize. 



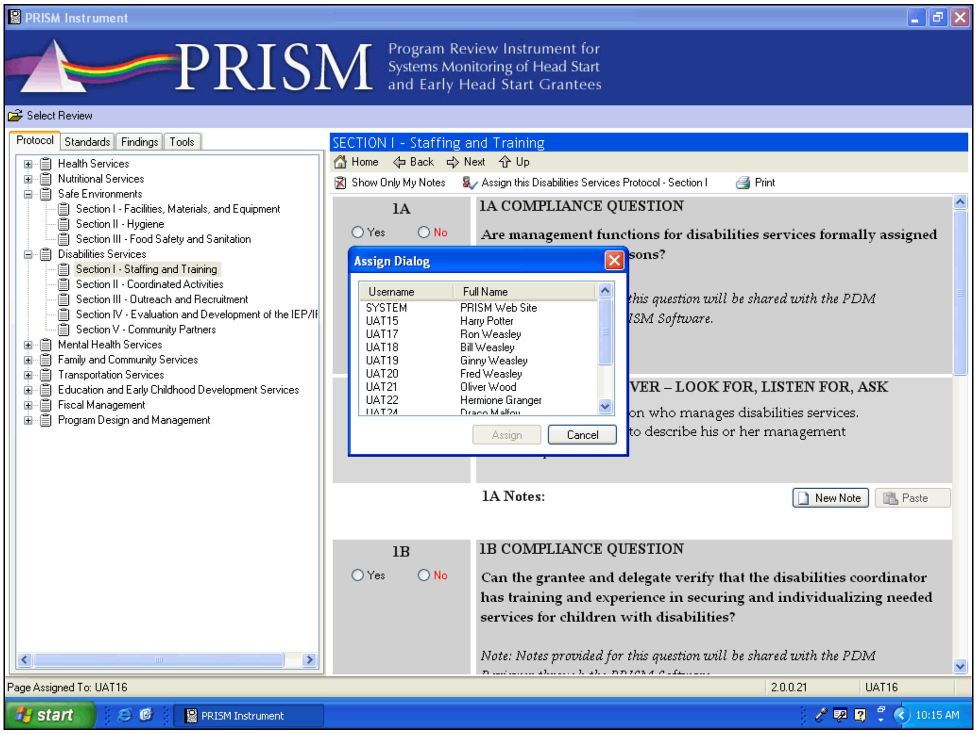
Step	Action
6.	Additionally, you may assign subsections of the Protocol sections to individual reviewers. On the **Protocol Tab** page, select the Protocol Section you wish to open. Click on the **Plus** button to expand the Section tree. 

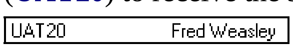


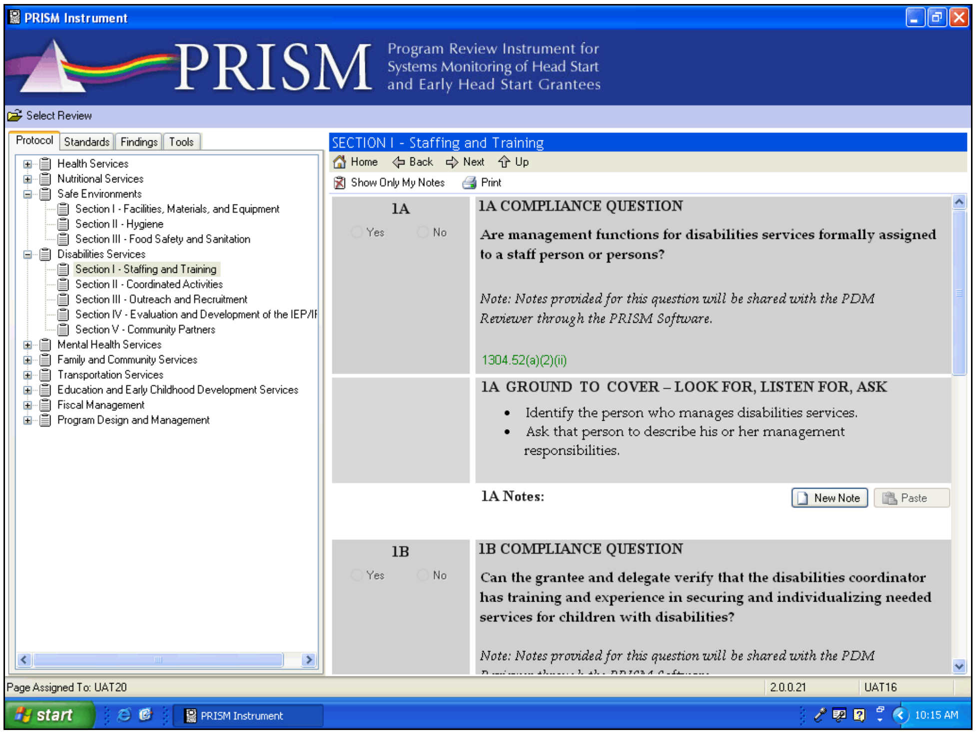
Step	Action
7.	In our example, the **Disabilities Services Section** has been selected. To assign a subsection of this section, select the subsection link and click to open. In our example we have selected **Section I – Staffing and Training**. 



Step	Action
8.	When the Subsection has been selected and opened, the **Protocol Compliance Questions** for that subsection will appear on the right hand side of the screen. You may now assign this subsection. In our example we will assign the **Disabilities Services Protocol – Section I** by selecting the **Assign** button. 



Step	Action
9.	A drop down menu will appear. You may select the reviewer to whom you wish to assign this subsection of the Protocol by selecting and highlighting the username. The **Assign** button is now active. In our example we have selected **Fred Weasley** (**UAT20**) to receive the subsection. 
10.	Click the **Assign** button to assign this subsection to the reviewer. 

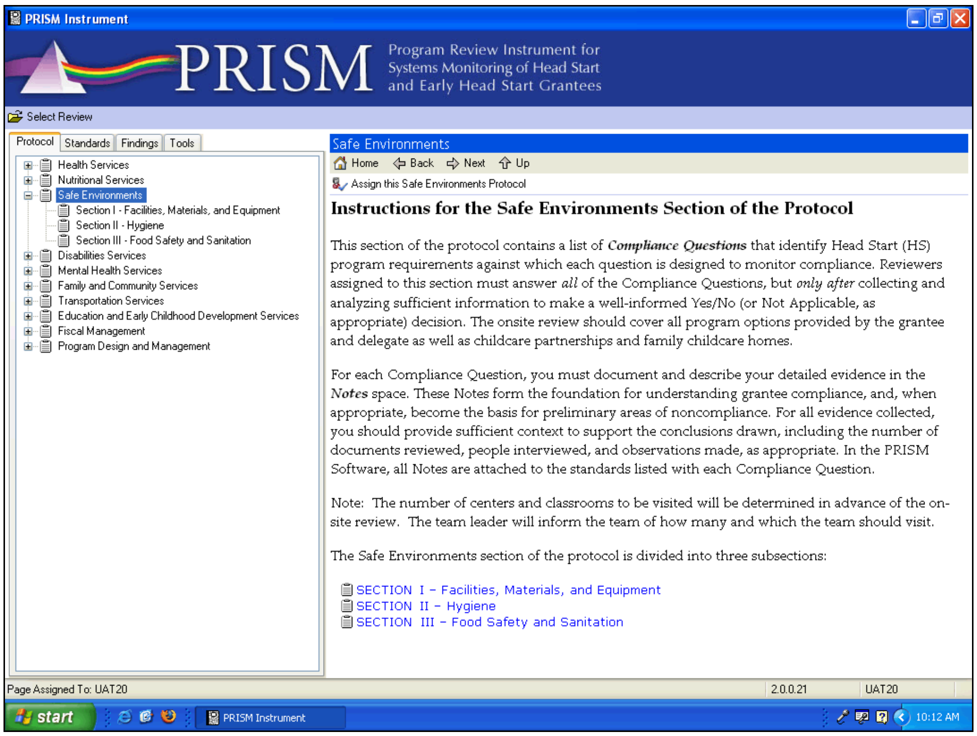


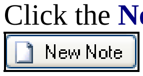
Step	Action
11.	You may return to the Protocol Home Page by clicking the **Home** navigation button located at the top of your PRISM Protocol page. 
12.	You have successfully assigned a section and subsection of the PRISM Protocol. Remember, you may assign sections of the Protocol at the section and subsection levels. Additionally, a reviewer may reassign his assignment to another reviewer or to the system (Web) once he has received the assignment. **Reminder:** Taking this action is the equivalent of addressing the envelope of a letter you would like to send. But until you mail the envelope, the recipient will not receive it. Likewise, in order for the person to receive this assignment, you and the person to whom you assigned the item must synchronize. Go to the **Select Review** page to synchronize.
13.	**End of Procedure.**

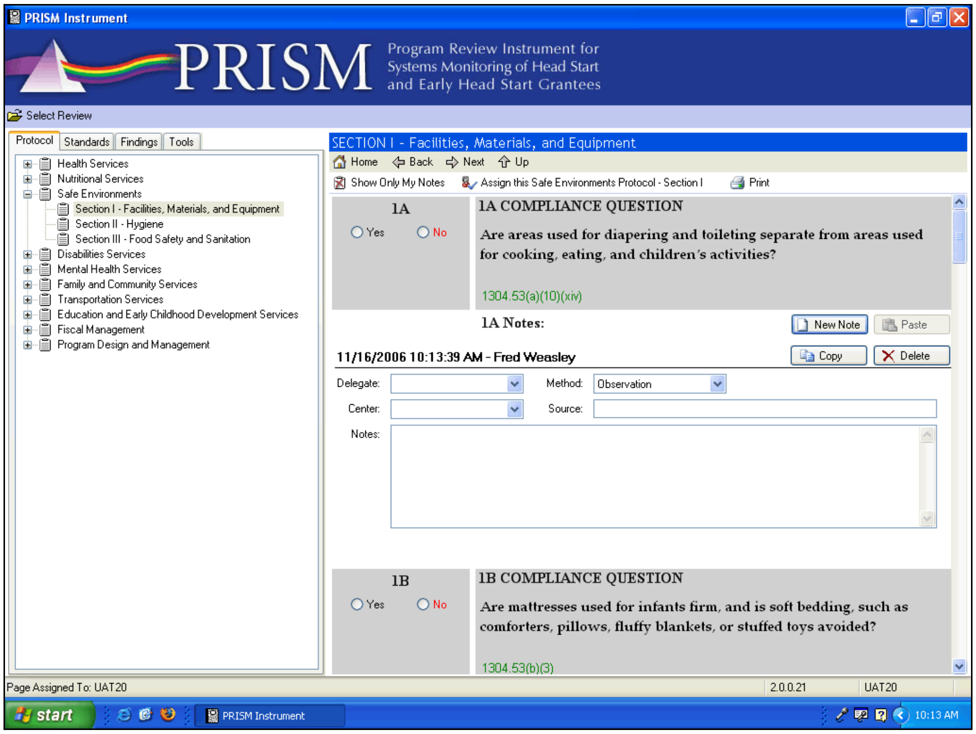
Adding Notes

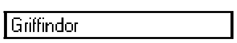
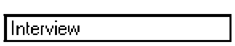
Procedure

In FY 2007, every Compliance Question in the Protocol must be answered in Triennial and First-Year reviews. The PRISM Protocol requires that each Compliance Question be answered. Additionally, for every applicable question, a note must be entered in the software. Reviewers enter notes in the "Notes" field associated with each compliance question and it becomes 'evidence' for that compliance question. Reviewers may enter notes prior to answering the Compliance Question. Any reviewer may enter a note for a compliance question even if that section is not assigned to them. The following tutorial provides guidance for adding notes within PRISM 2007.

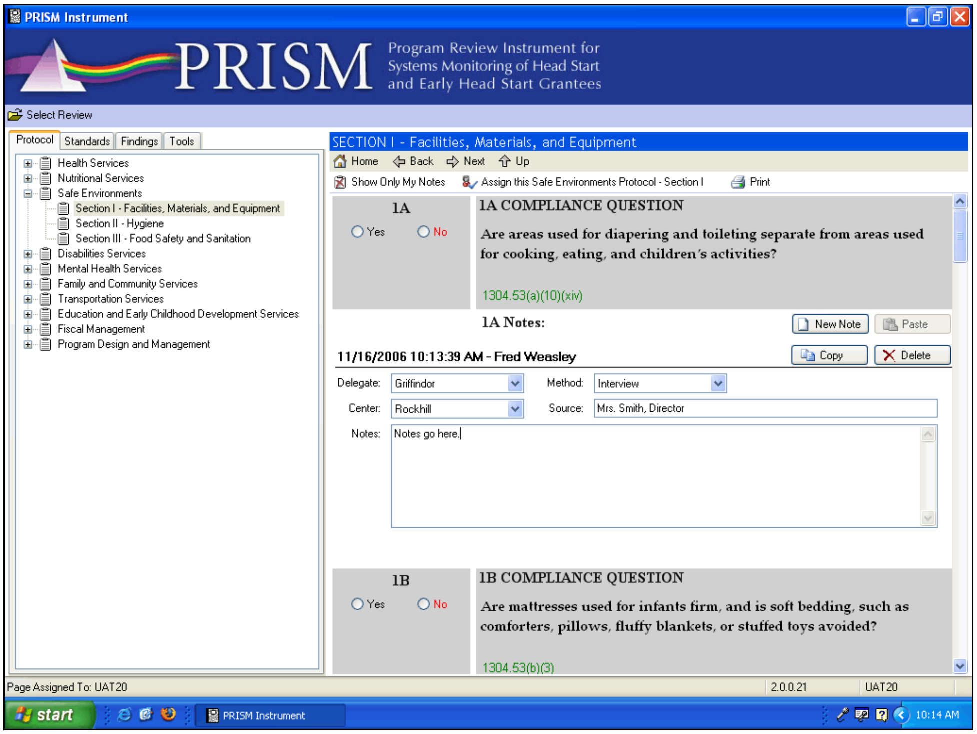


Step	Action
1.	From the **Protocol Tab**, click and open the section of the Protocol in which you wish to enter a note. In our example, we have selected **Safe Environments**. The instructions for completing the section appear on the right hand side of the screen. You may also select the **Subsection** link on the right hand side of the screen to open this subsection. In our example we will select **Section I- Facilities, Materials and Equipment**.
2.	The Compliance Questions for this subsection are now visible on the right hand side of the screen. Below the **Compliance Question** and **Ground to Cover Prompt** you will see a **New Note** Button. Click the **New Note** button (Evidence) to open a New Note text window. 



Step	Action
3.	Click the **Delegate** button to select the appropriate delegate from the drop down menu. 
4.	Select **Griffindor**. 
5.	Select the appropriate **Center** from the drop down menu. 
6.	Select **Rockhill**. 
7.	Select the method for which this note (evidence) was gathered. You must include the type. 
8.	Select **Interview**. 
9.	Click in the **Source** field.
10.	You must include the source. This field is not pre-populated. You must type in a source for each note. This source field will be included in your Notes. In this example we will enter "**Mrs. Smith, Director**". Please remember that names and titles may be included in the Notes/Evidence, but not in the narrative of a Preliminary Area of Noncompliance.

Step	Action
11.	Click into the **Notes** field.
12.	In this example, we will enter "**Notes go here.**".

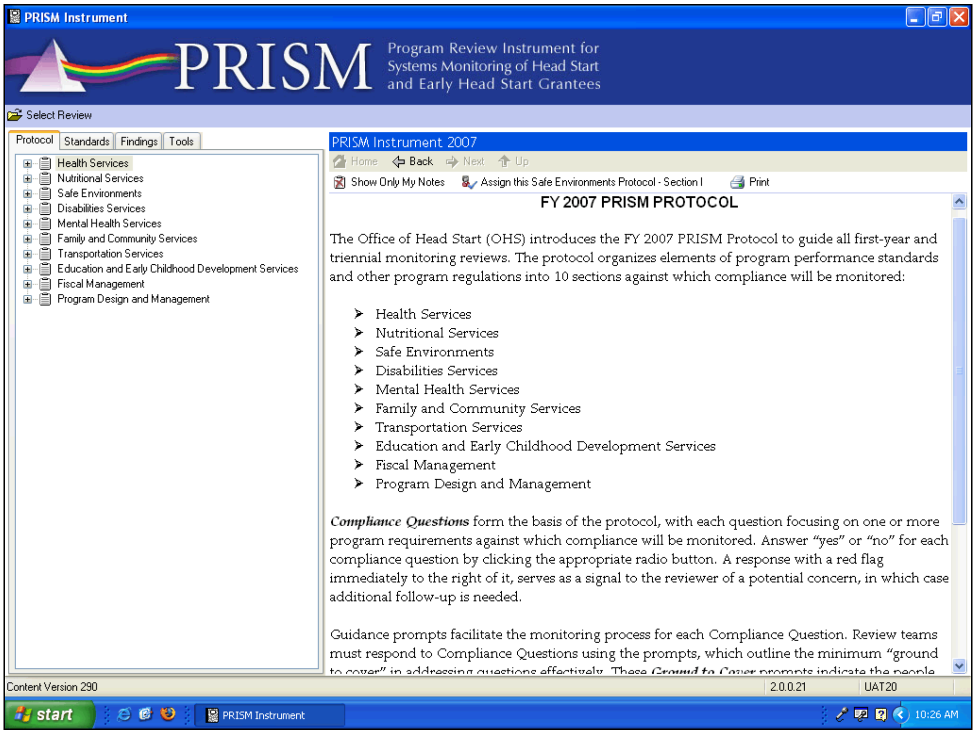


Step	Action
13.	You may create additional notes by again selecting **New Note**. Again, select the delegate, center and method from the appropriate drop down menu. You may, at a later time, return to this note text box and continue to add to your note. Click the **Home** button.  Home
14.	**End of Procedure.**

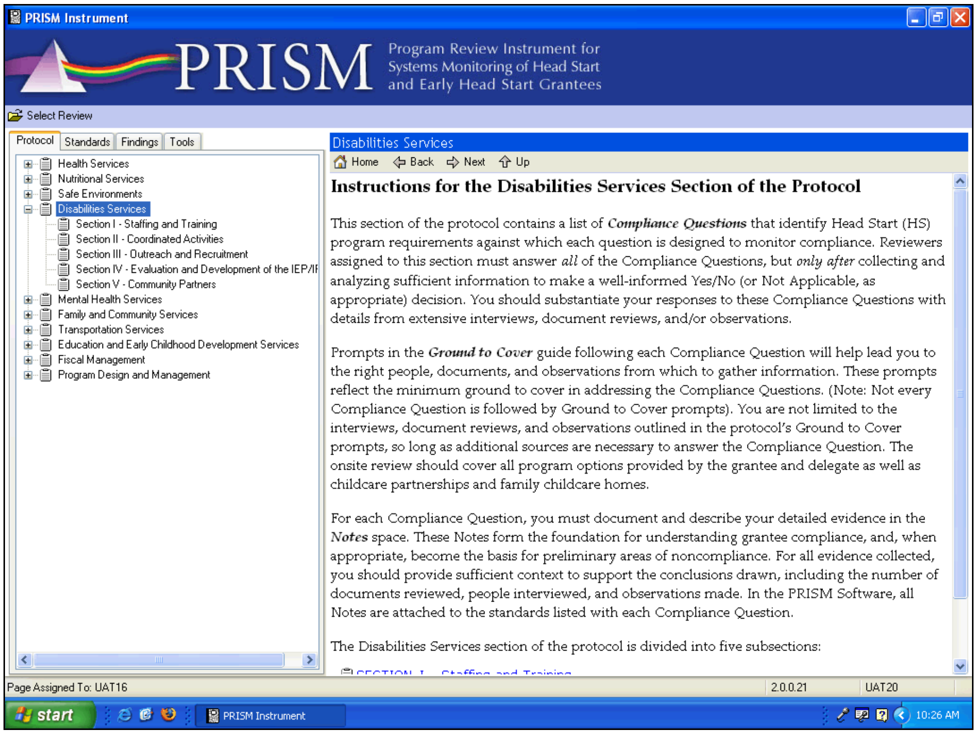
Answering the Compliance Question

Procedure

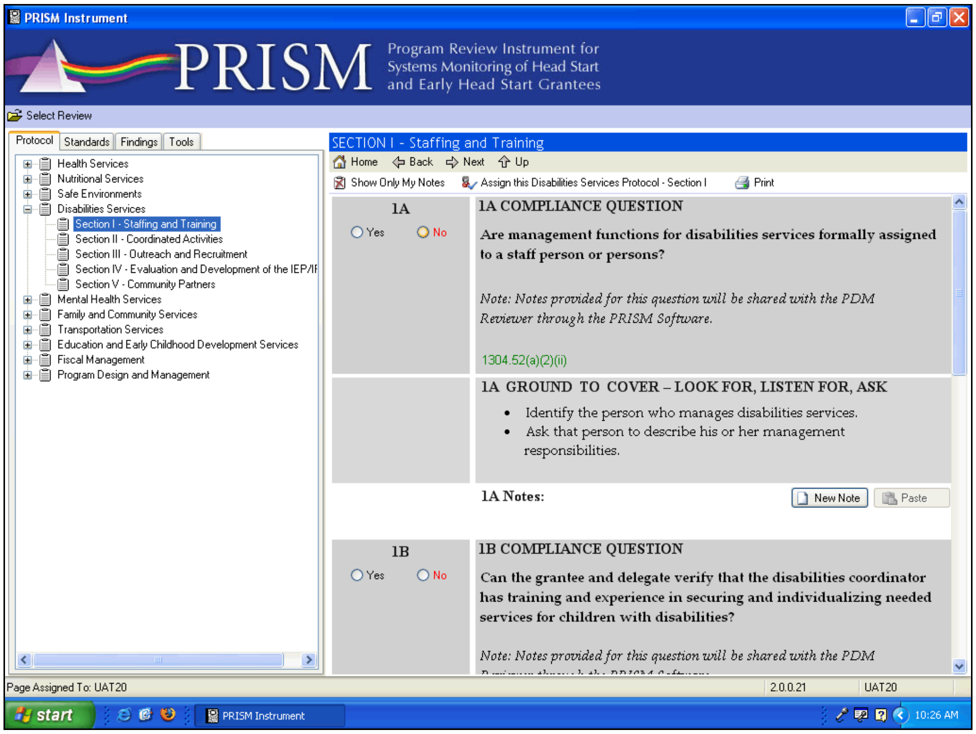
The PRISM 2007 Protocol must be completed in its entirety. All the compliance questions must be answered. The following tutorial will provide you with guidance for answering the Compliance Question within the PRISM 2007 Software. This guidance does not provide you with policy directions in how to answer each question; it merely illustrates the steps in answering a question in the software.



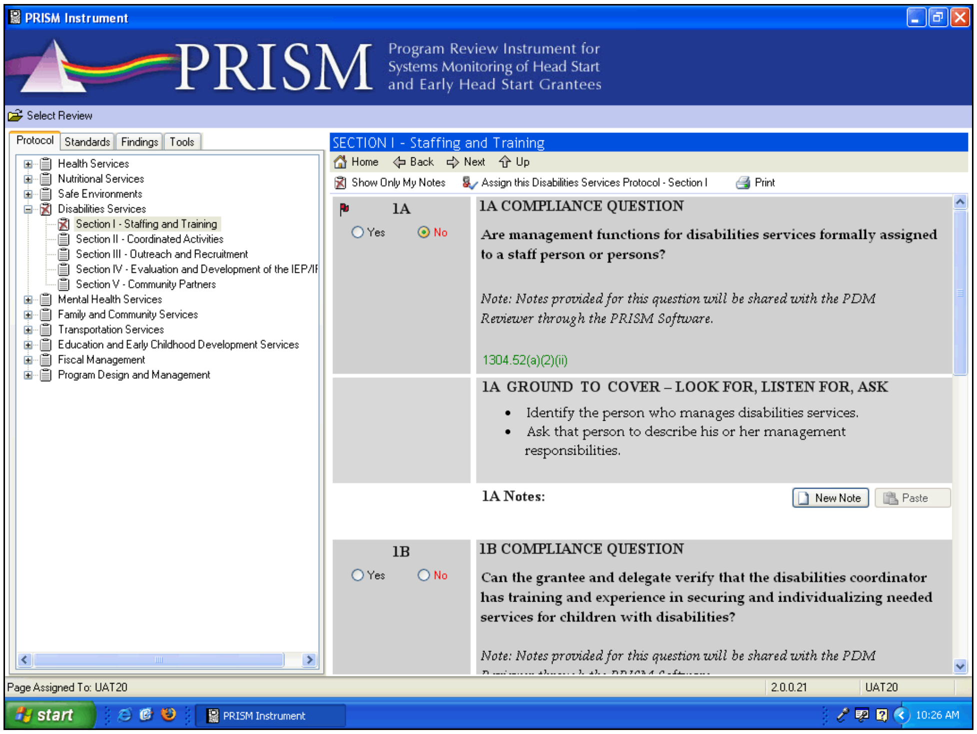
Step	Action
1.	In the PRISM Protocol, select the Protocol Section on the left hand tab side of the screen to access the subsection of the protocol for which you are currently assigned. Click the **Plus** button to expand the tree. 



Step	Action
2.	In our example we have selected **Section I – Staffing and Training** under **Safe Environments**. Click on the link to be taken to the Compliance Questions for this subsection. 



Step	Action
3.	A reviewer must answer each applicable question by selecting "**Yes**" or "**No**". Some questions are not applicable and are indicated as such by a "**N/A**" button. In our example we have selected to answer question **1A** with a "**No**". You will notice that by answering no to this question a **red flag** now appears besides this question. The reviewer must also enter a note for all applicable questions. Refer to the ***Adding Notes*** tutorial for guidance in creating and adding notes in the Protocol. 

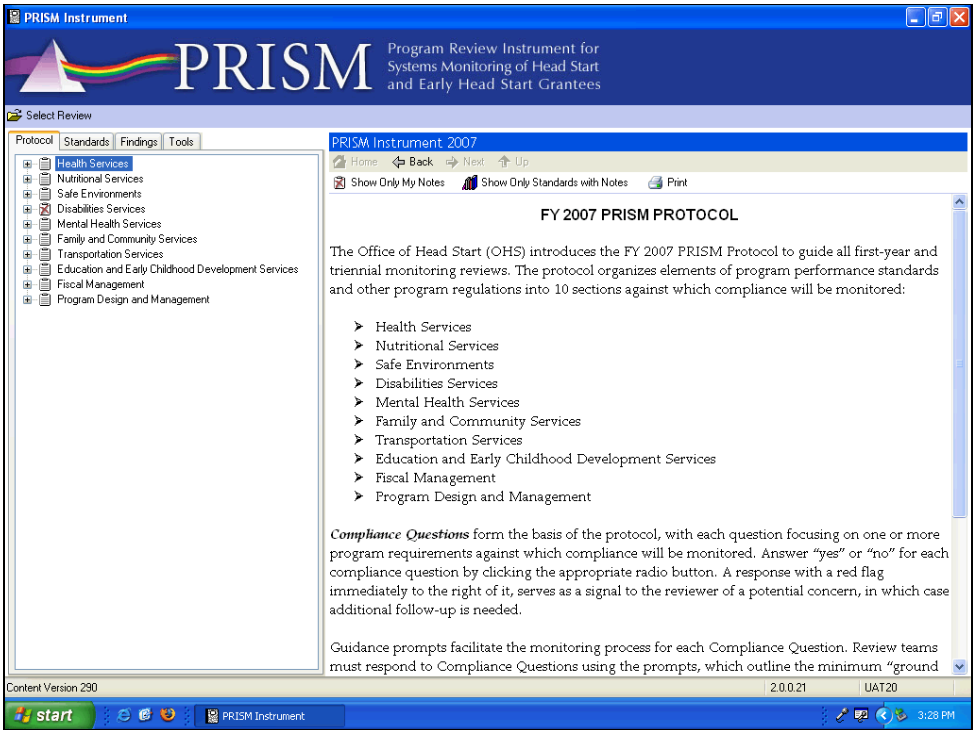


Step	Action
4.	You have successfully answered a compliance question. Please remember, a reviewer may only answer questions that have been assigned to them. Click the **Home** button to return home. 
5.	**End of Procedure.**

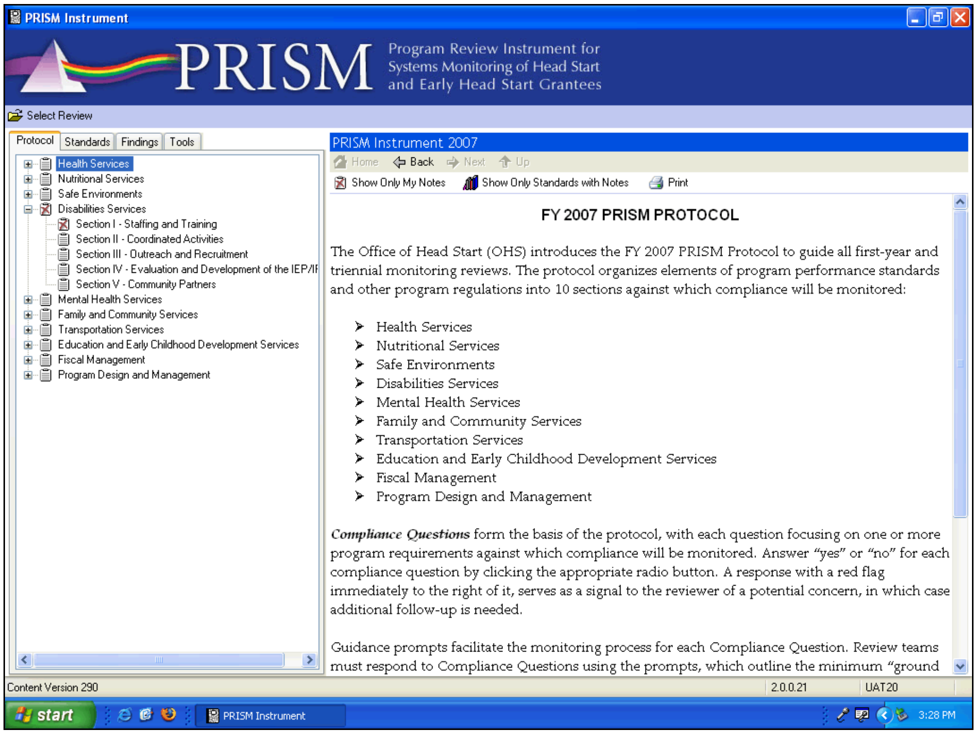
Creating a Finding

Procedure

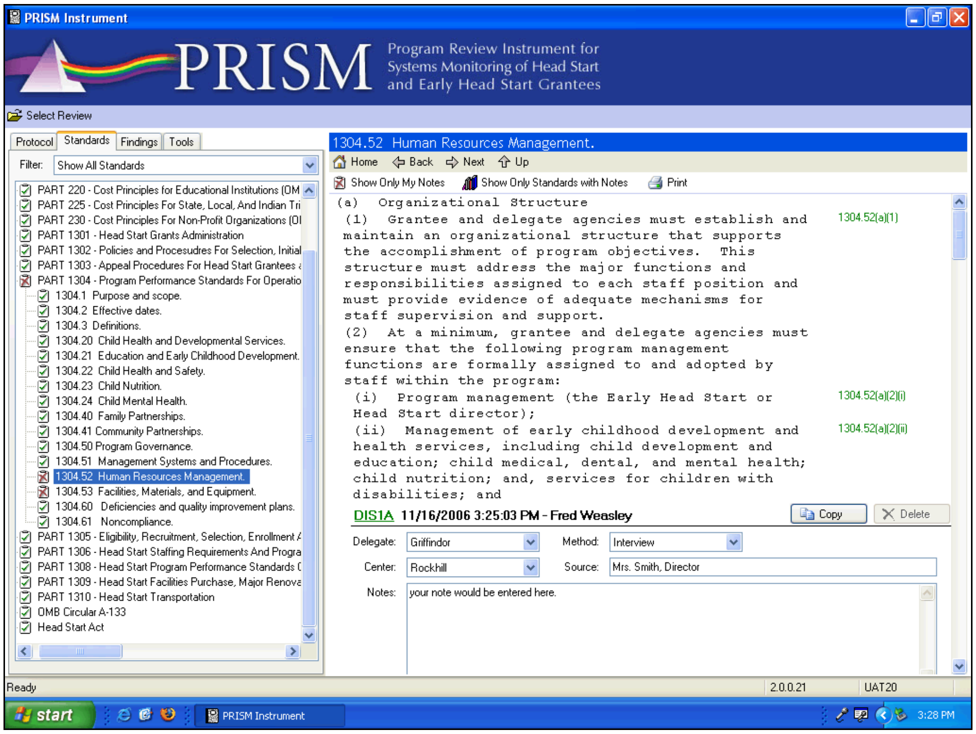
Any Compliance Question that has been answered and is now associated with a red flag will support a Finding. The following tutorial provides guidance in creating Findings once notes (evidence) has been entered in the Stand Alone.



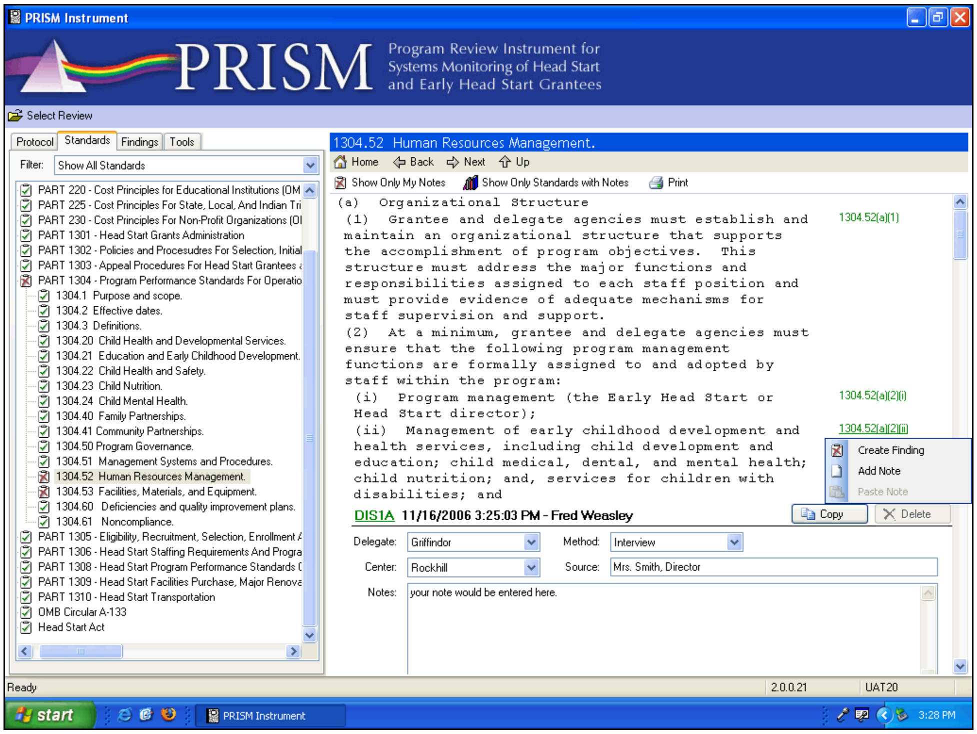
Step	Action
1.	Click the object. Click the + to expand the Protocol Tab. 



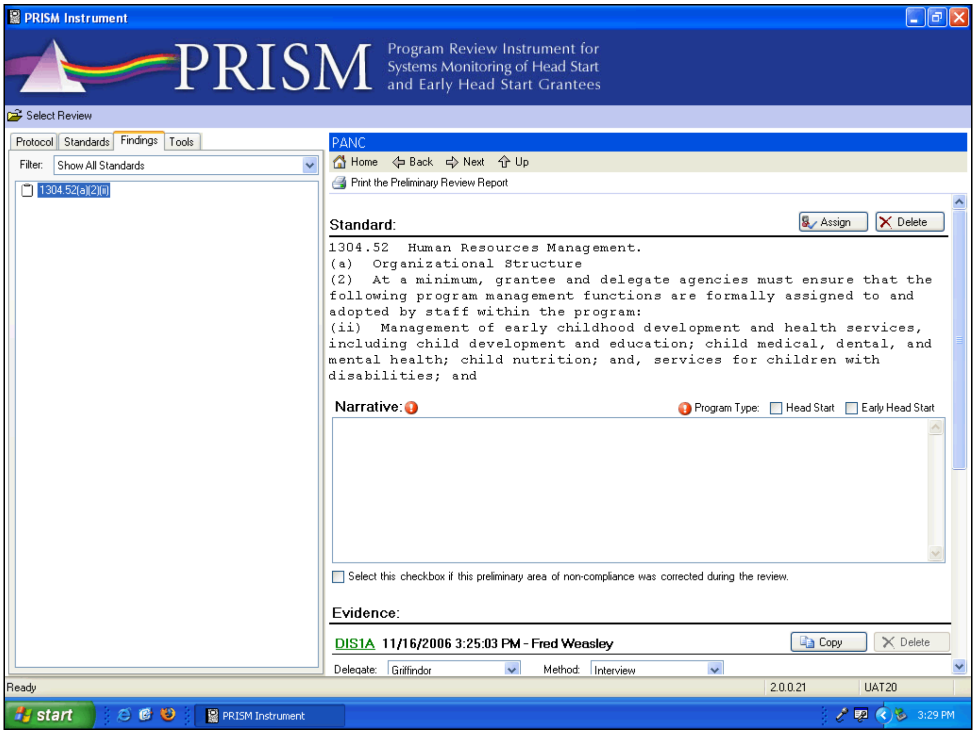
Step	Action
2.	Navigate to the **Disabilities Services Section** and select **Section I, Staffing and Training** to access the Compliance Questions associated with this section of the Protocol. Any question that has a red flag associated with it will support a finding. Section I - Staffing and Training
3.	Select the **Standard Link** below the Compliance Question to be directed to the Standard Text. In our example we have selected Standard 1304.52(a)(2)(ii). Click the **1304.52(a)(2)(ii)** link. 1304.52(a)(2)(ii)



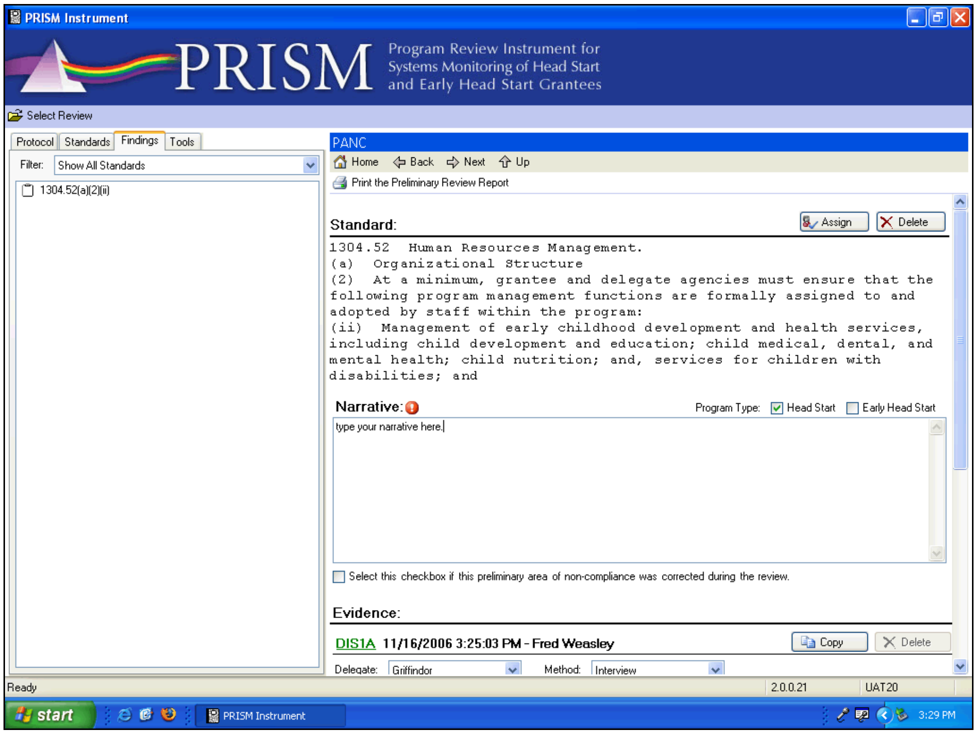
Step	Action
4.	You will be directed to the **Standards** page. Any notes (evidence) that have been created and associated with this standard will appear underneath the text of the standard. You may add additional notes within this screen by selecting the standard link and selecting **Add Note**. For this example, we will create a **Finding**. Click the **1304.52(a)(2)(ii)** link. 1304.52(a)(2)(ii)



Step	Action
5.	To create a finding, select the standard link, click and select **Create Finding**. A finding is automatically created. The standard link will now be annotated by a **red flag** indicating a **Finding**. 



Step	Action
6.	The **Narrative Text Field** will appear. Select the program type (Head Start or Early Head Start). For our example we will select Head Start. Click the **Head Start** checkbox.
7.	Click the **Narrative Field**. You may enter the text of your narrative here.
8.	Enter the desired information into the field. In our example we have typed in: "**type your narrative here.**" within the narrative text field. If the Finding was corrected during the review, select the check box indicating that the finding has been corrected during the review.



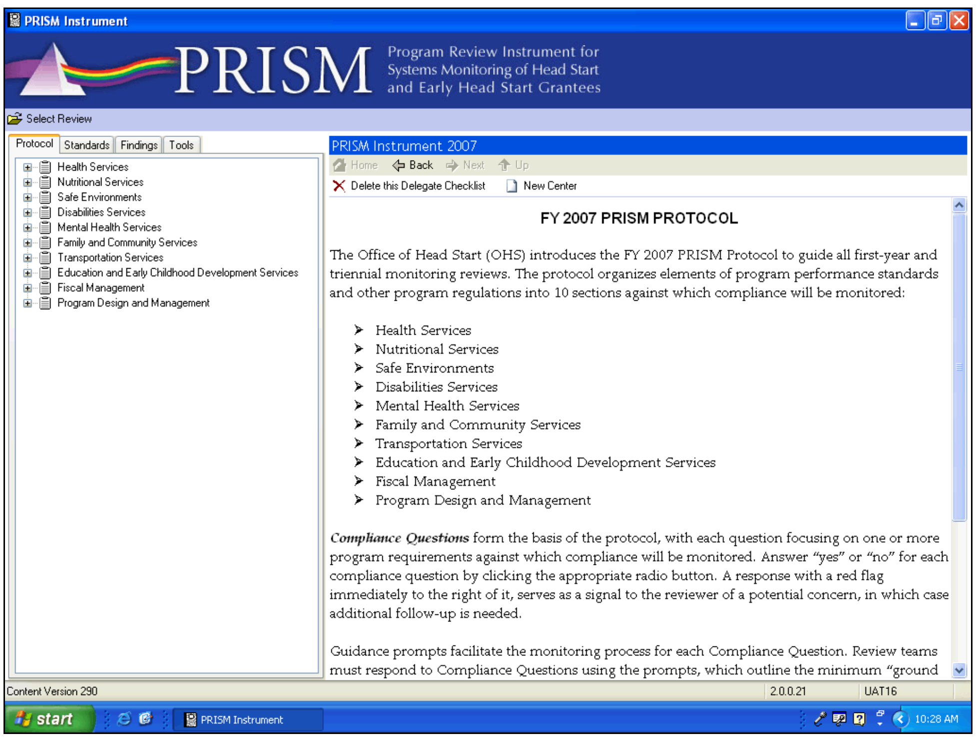
Step	Action
9.	Your Finding will now appear under the Findings Tab. Click Home to return to the Protocol Home Page. 
10.	**End of Procedure.**

Worksheets and Checklists

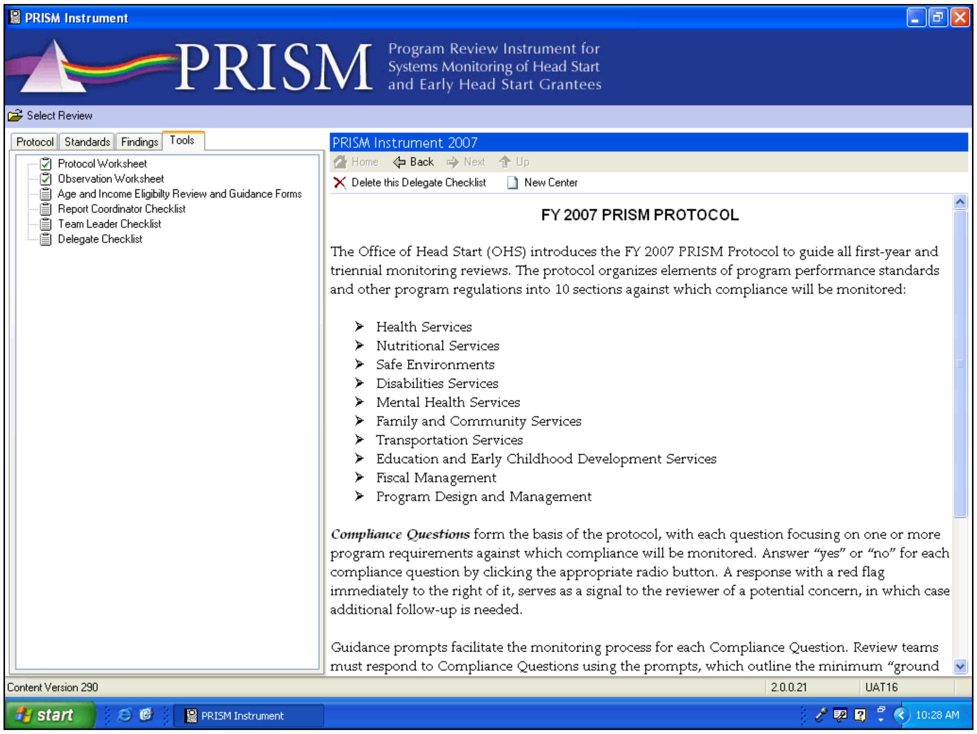
Completing Administrative Checklists

Procedure

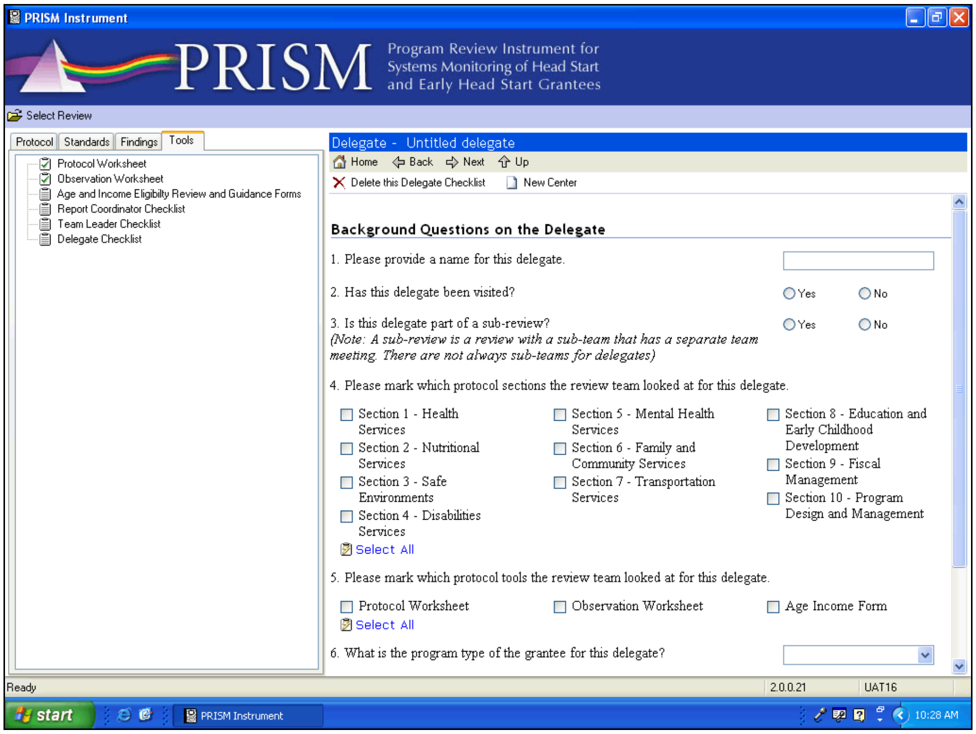
Each checklist or worksheet includes instructions specific to that particular worksheet or checklist. Various worksheets and checklists are completed by different members of the review team. The following tutorial provides guidance for completing the Delegate Checklist, and similar steps can be followed to complete the RC, FTL and Center Checklists. Please review the instructions for completing other worksheets/checklists.



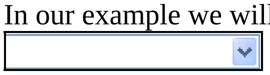
Step	Action
1.	To access the Delegate Checklist, click the **Tools Tab**. 

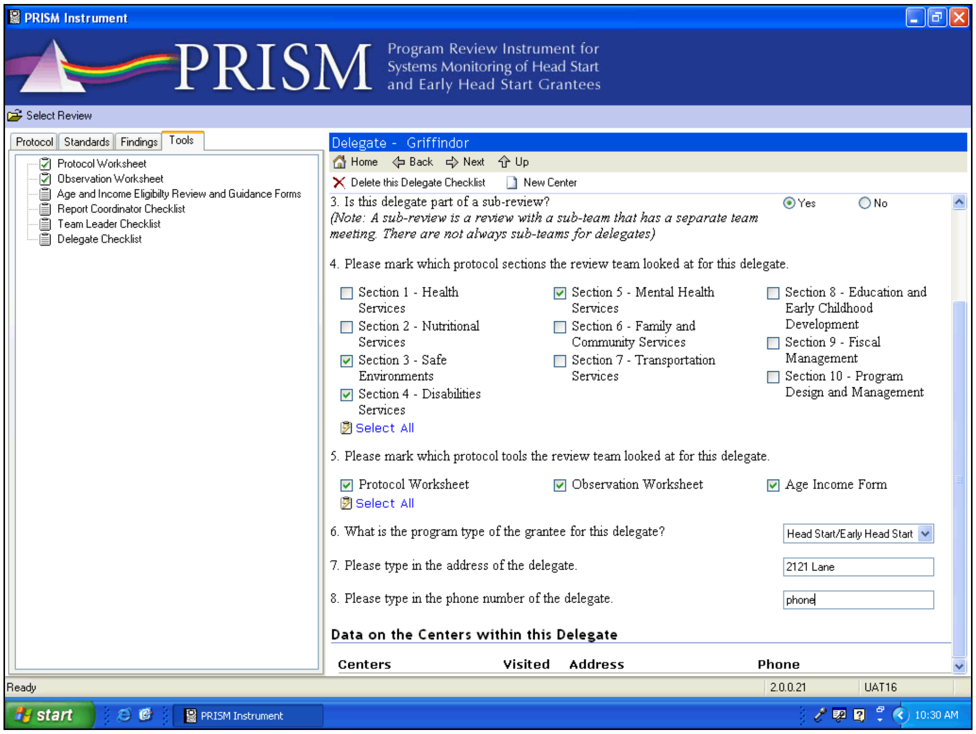


Step	Action
2.	Click the **Delegate Checklist** link on the Left hand tab side of the screen. The instructions for completing this checklist will appear on the right hand side of the screen. Delegate Checklist
3.	Click the **New Delegate Checklist** button to create a New Delegate Checklist. New Delegate Checklist

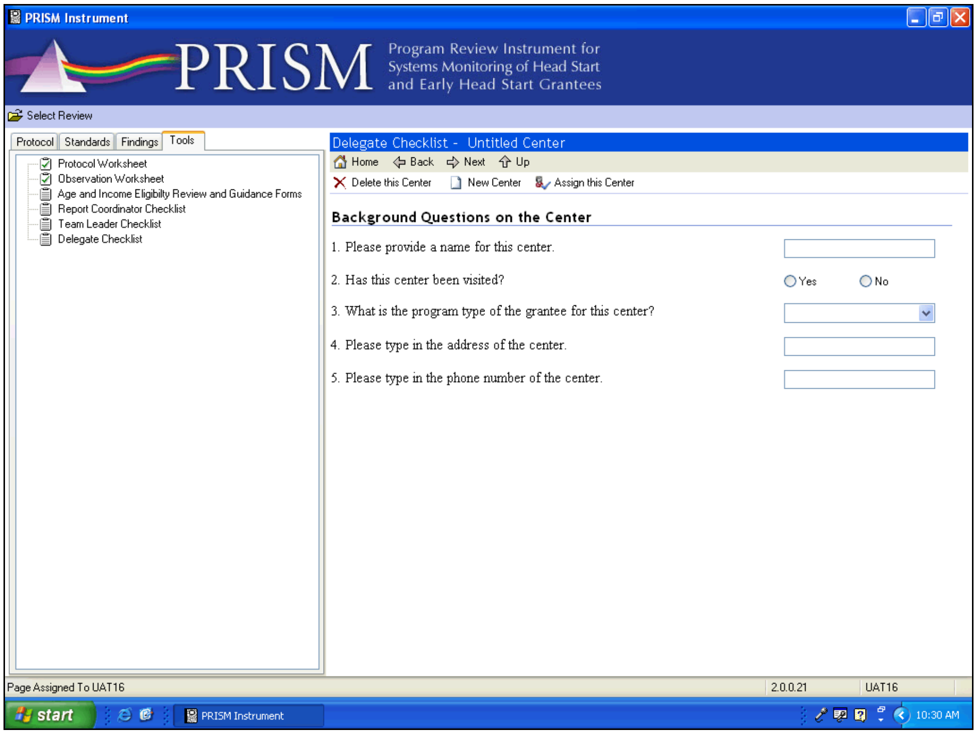


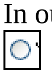
Step	Action
4.	In the Delegate Name field, type in the name of the Delegate. For our example we will use the Delegate name "**Griffindor**".
5.	Answer question 2 as it pertains to the delegate. For our example we have selected Yes, the Delegate has been visited. Click **Yes.** 
6.	Answer question 3 as it pertains to the delegate. For our example, we have selected Yes, this delegate is part of a sub-review. Click the **Yes** button. 
7.	Question 4 asks the reviewer to mark the protocol sections the review team has looked at for this particular delegate. In our example we have selected several sections. You may also select the **Select All** button if this delegate was reviewed within all sections of the protocol. Click on **Safe Environments**. 
8.	Click on **Disabilities Services.** 
9.	Click on **Mental Health Services**. 

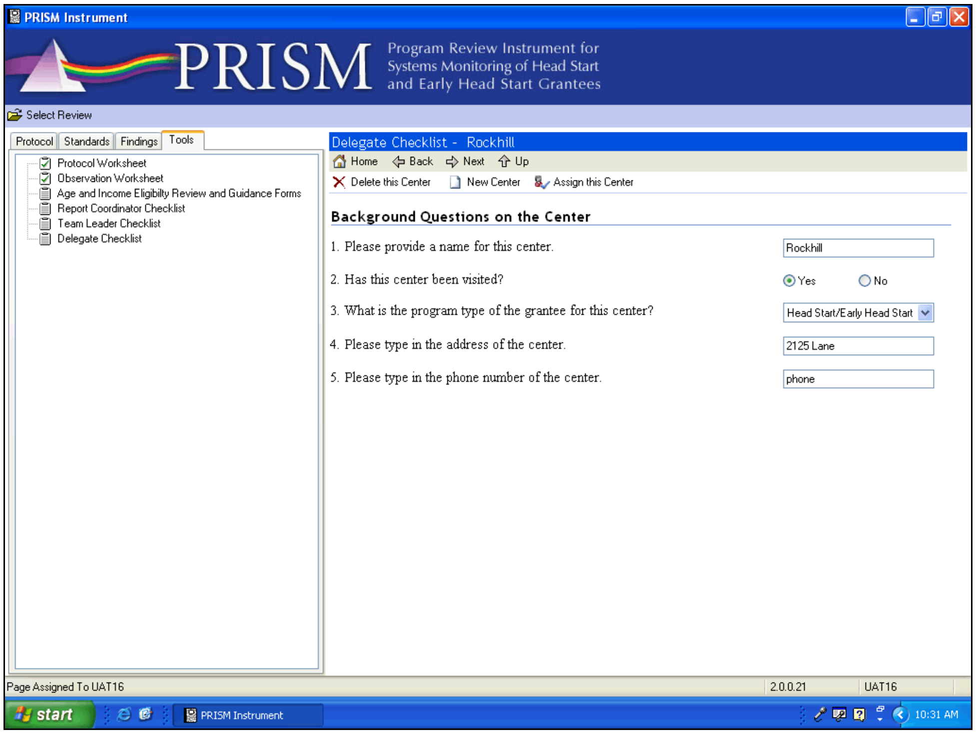
Step	Action
10.	Question 5 asks the reviewer to select all the tools that the reviewer has used with this delegate. In our example we have selected the **Select All** to include the **Protocol Worksheet**, the **Observation Worksheet** and the **Age and Income Eligibility Form**. Click on **Select All**. 
11.	Notice that all the forms and checklists have been checked at once. You may deselect any checklist or form that has not been reviewed by the reviewer for this delegate.
12.	To scroll to the next question, press the left mouse button over the scrollbar and drag the mouse to the desired location.
13.	Question 6 asks you to select the program type for this delegate grantee. A drop down box will provide you with the program type categories. In our example we will select **Head Start/Early Head Start**. 
14.	Click **Head Start/Early Head Start** in the drop down box to select this category. 
15.	Question 7 asks the reviewer to enter in a street address for the delegate. Type in the address in this field. In our example we have typed in: "**2121 Lane**".
16.	Question 8 asks the reviewer to enter the delegate phone number. Type in the numerical phone number for this delegate (e.g. 555-444-1212). For our example we have entered "**phone**". However, remember to enter in the area code and phone number for the delegate.



Step	Action
17.	To add a center to the delegate checklist, you must click the **New Center** button. New Center



Step	Action
18.	Question 1 asks the reviewer to enter in the name of the center. In our example we have typed in "**Rockhill**" as our center name.
19.	Question 2 asks if the center has been visited. In our example we have selected **Yes**. 
20.	Question three asks the reviewer to select the program type for this center. A drop down menu provides the categories. In our example we will select **Head Start/Early Head Start** from the drop down menu. 
21.	Click on **Head Start/Early Head Start**. 
22.	Question 4 asks the reviewer to type in the center address. In our example we shall type in "**2125 Lane**" as our center address.
23.	Question 5 asks the reviewer to type in the phone number of the center. In our example we have typed in "**phone**". Please remember to enter in a full phone number including the area code (e.g. 555-444-1213).



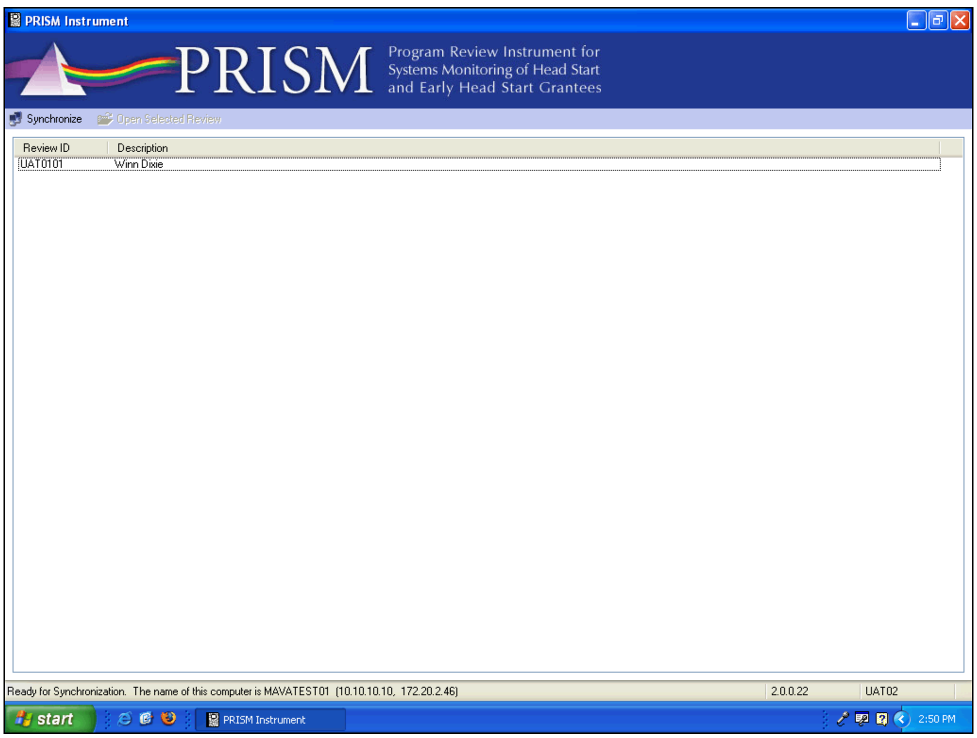
Step	Action
24.	Navigate outside of this delegate checklist to save the information. Click the **Home** button. 
25.	The Delegate Checklist has been successfully created. If completed correctly, the Delegate and Center information will populate the drop-down boxes when team numbers on this review are entering Notes.
26.	**End of Procedure.**

Conducting a Follow-Up Review

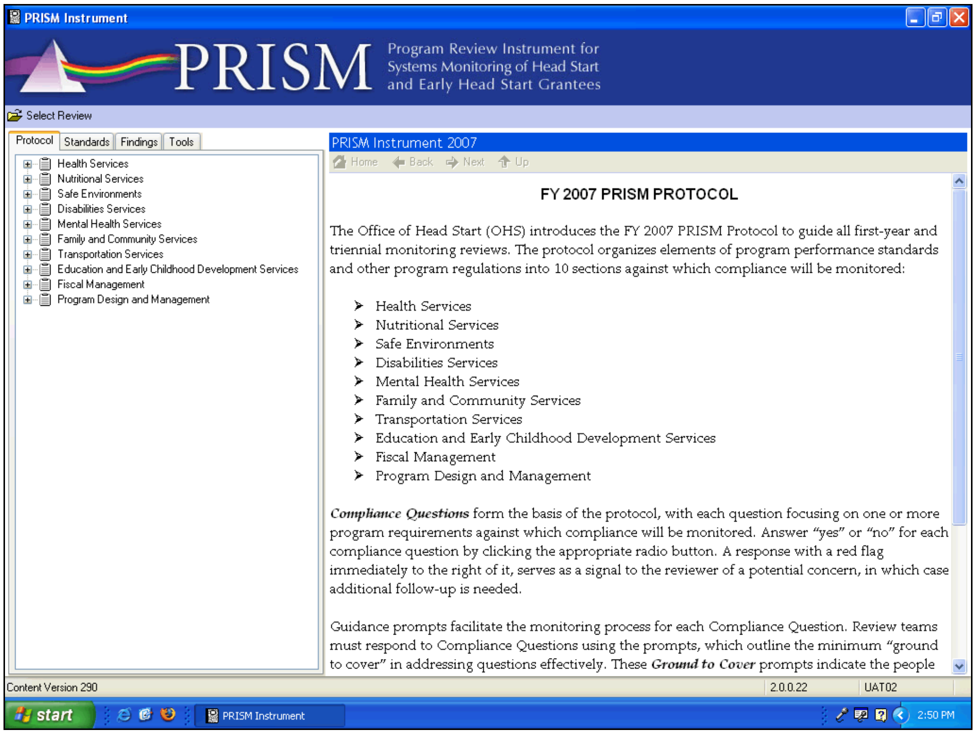
Accessing a Follow-Up Review in PRISM 2007

Procedure

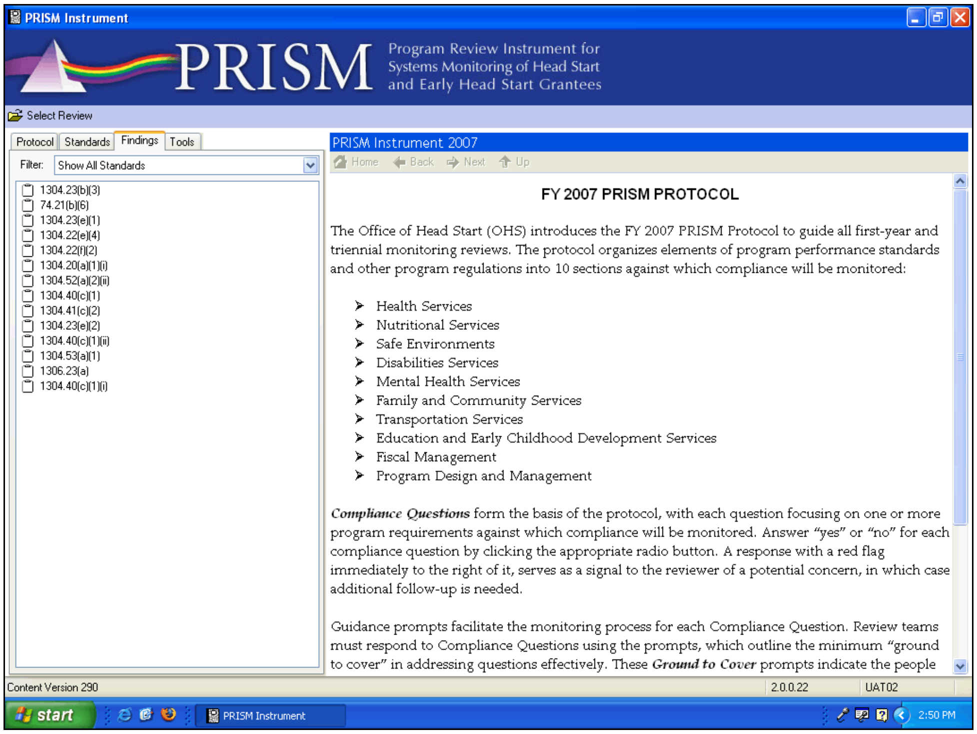
All reviews, including Follow-Up Reviews will be conducted in the PRISM 2007 Software. Follow-Up Reviews may use the PRISM 2007 software to access Findings but the Compliance Questions do not have to be answered. This tutorial will provide guidance to the reviewer conducting a Follow Up review who will need to access previous areas of non-compliance.



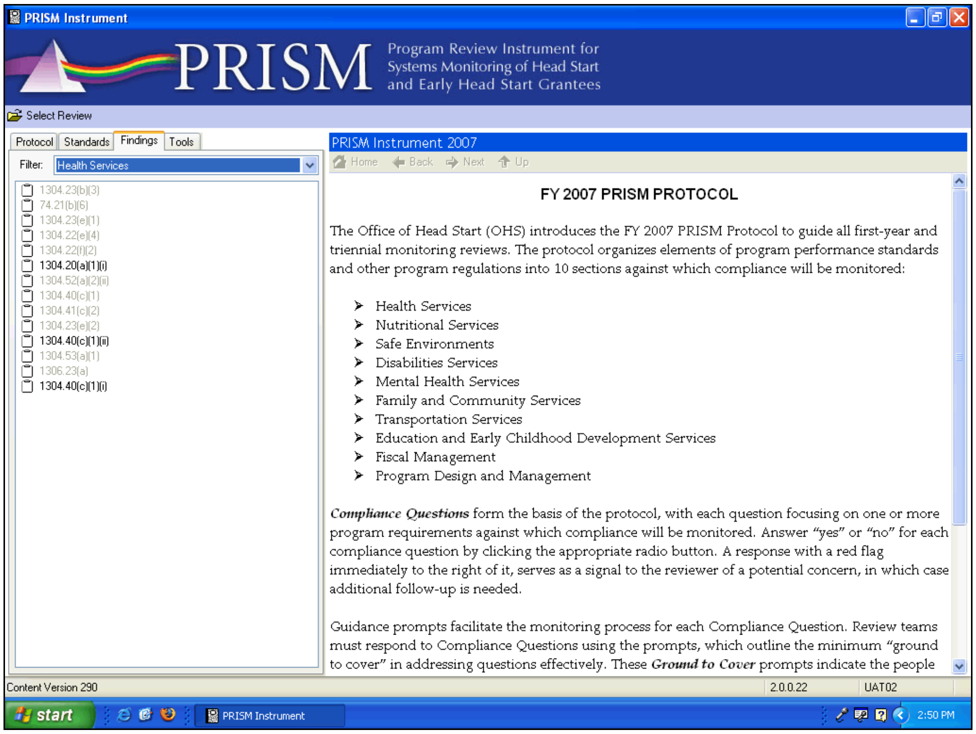
Step	Action
1.	From the **Synchronization** window, confirm the **Review ID** and select it. Double-click the Review ID to open this Review. In our example we will double click **UAT0101 Winn Dixie** to access this Follow Up review.



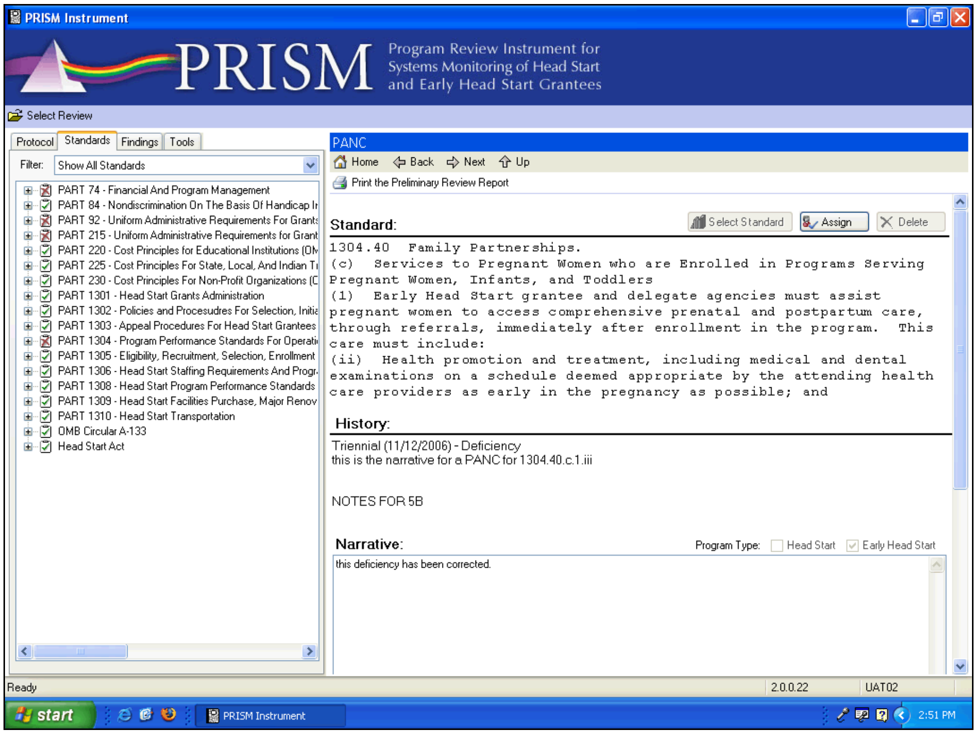
Step	Action
2.	Navigate to the **Findings Tab** and select this tab to open. Findings



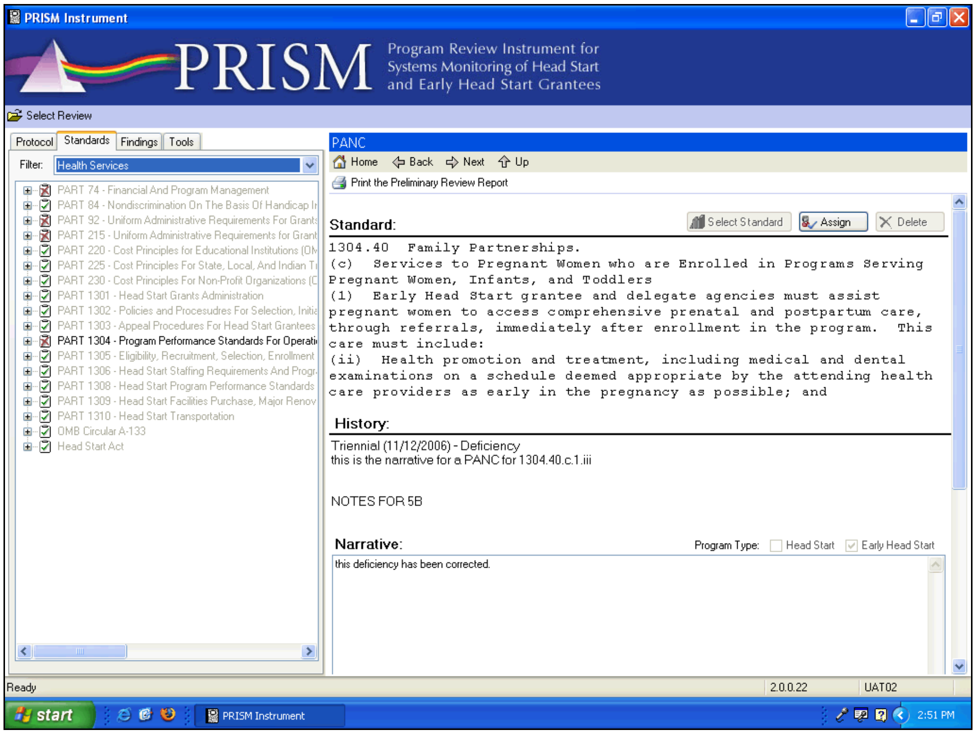
Step	Action
3.	All findings (**Preliminary and Areas of Non-Compliance**) will be visible in this tab. The reviewer should confirm that all findings reported during the previous review (Triennial or First Year) and that are now being followed upon during the follow up review have populated the **Findings Tab**. To view the findings associated by standards, click the **Drop Down** button and select the **Protocol Section**. In our example, we will select **Health Services**. 
4.	Select **Health Services** under the **Filter** to sort findings by **Protocol Section**. Health Services

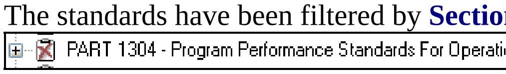


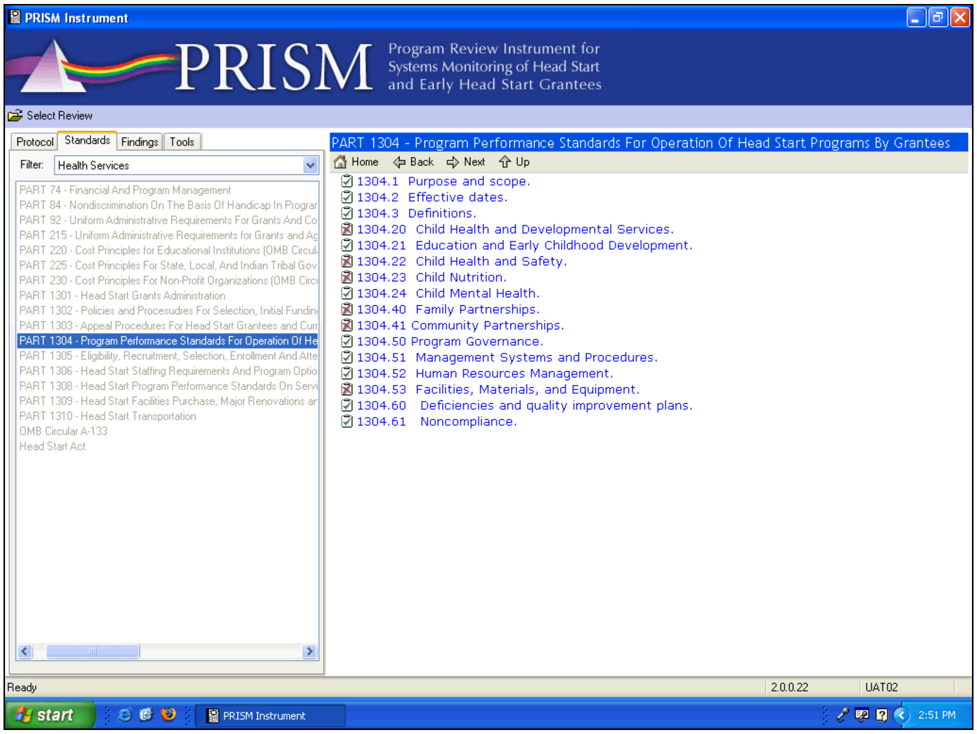
Step	Action
5.	You will see the findings that have been created in the previous review now filtered in this view. In our example, we will click on finding **1304.40(c)(1)(ii)**. 1304.40(c)(1)(ii)
6.	To go to this finding, select the **Standards Tab**. Standards

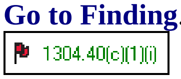


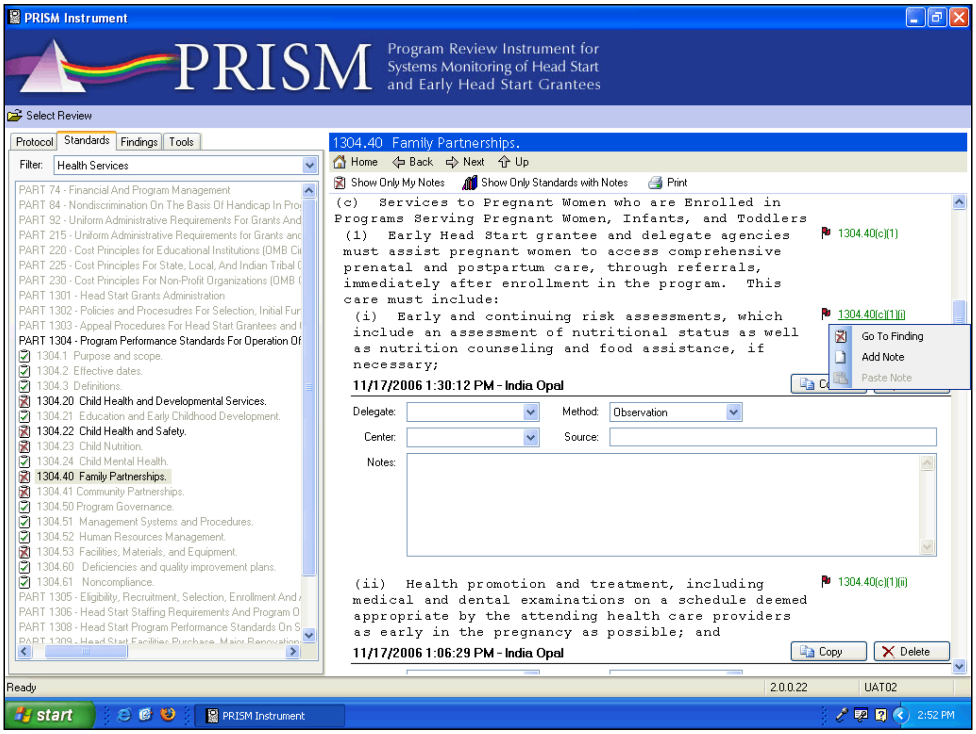
Step	Action
7.	Select the **Drop Down** button to filter the standards by **Protocol Section**. 
8.	In our example we will select the **Health Services Section**. Health Services

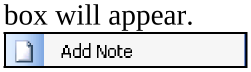


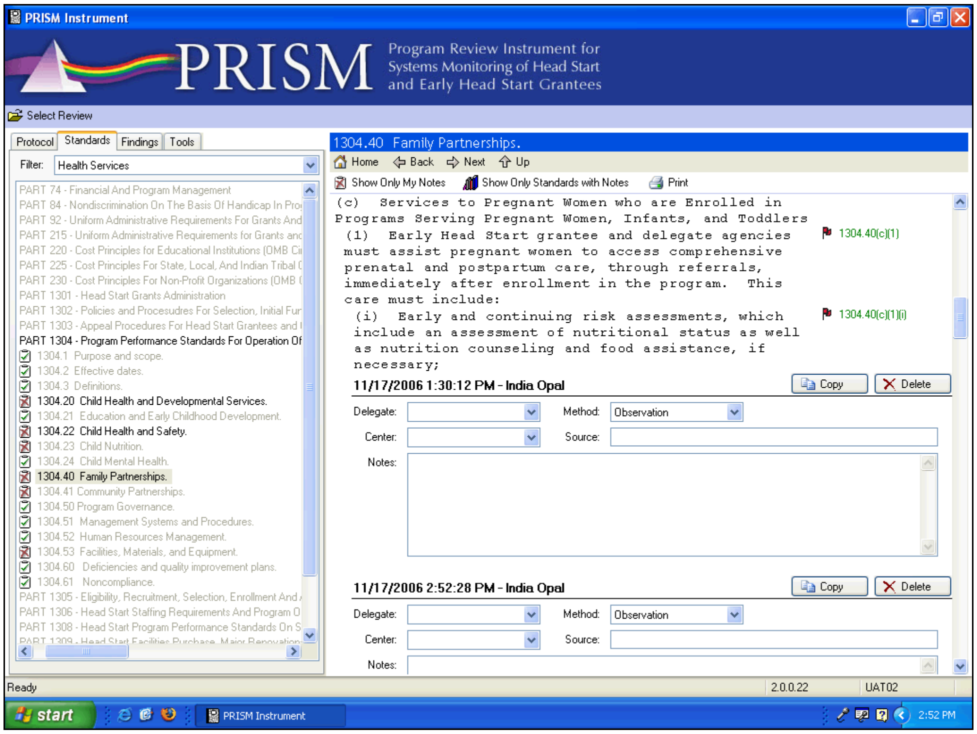
Step	Action
9.	The standards have been filtered by **Section**. Sorted standards appear in bold print. 



Step	Action
10.	In our example, we will select standard **1304.40 Family Partnerships.** The standard appears on the right hand side of the screen. Click on the standard to expand to the child level. Select the standard and click to navigate to the standard and finding. 
11.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.
12.	On the **Standards** page, click the **1304.40(c)(1)(i)** link. You may now **Add Notes** or **Go to Finding**. 

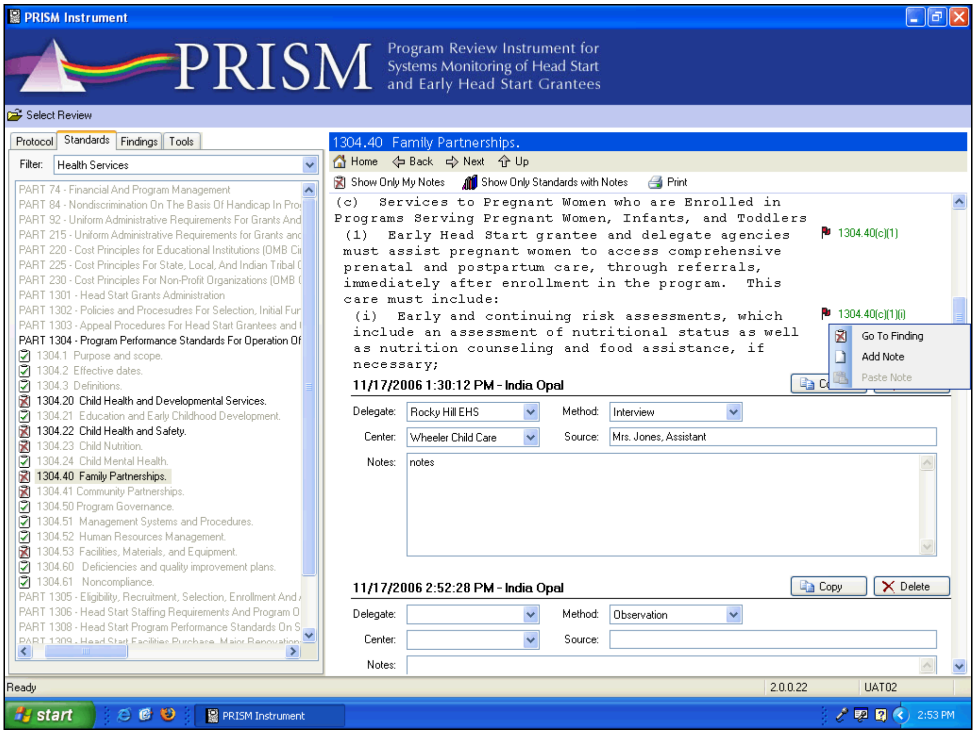


Step	Action
13.	In our example, we will add an additional note by selecting **Add Note**. The Note text box will appear. 

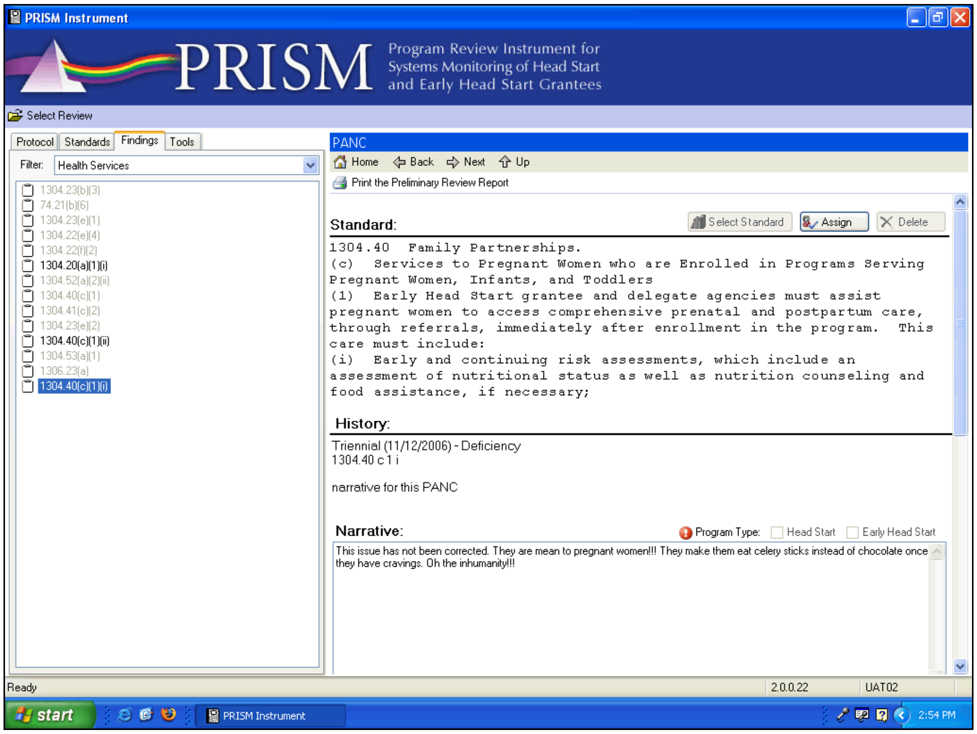


Step	Action
14.	A new note (evidence) is created by selecting the delegate from a drop down menu.
15.	In our example we have selected **Rocky Hill EHS** as our delegate. Rocky Hill EHS
16.	Select the **Center** associated with this delegate from the drop down menu.
17.	In our example we have chosen **Wheeler Child Care** as our center. Wheeler Child Care
18.	Select the **Method** used to obtain this note (evidence) from the drop down menu.
19.	In our example we have selected **Interview**. Interview
20.	Enter a source for the source of the note.
21.	In our example, we have entered "**Mrs. Jones, Assistant**".
22.	Move your cursor to the text box to enter your note.
23.	In our example we have typed in "**notes**". Your new notes (evidence) would be entered in this text box.

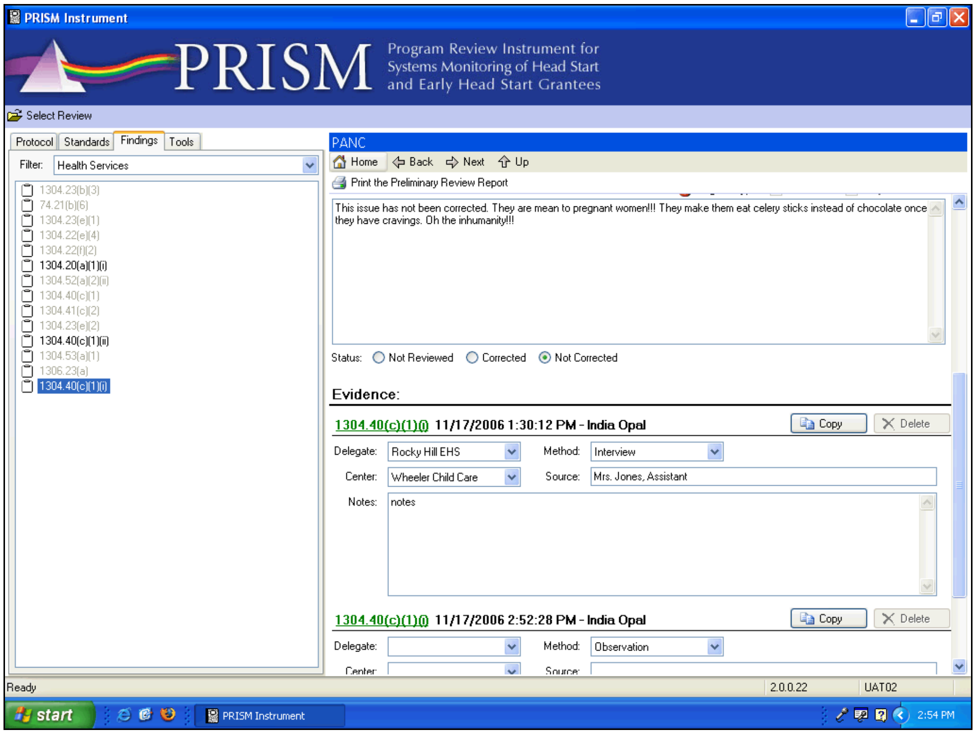
Step	Action
24.	Click the **1304.40(c)(1)(i)** link to go to finding. In our example, we will continue to follow **1304.40(c)(1)(ii)**. 



Step	Action
25.	Select the **Go To Finding** from the drop down menu. 



Step	Action
26.	Press the left mouse button over the scrollbar and drag the mouse down.
27.	You may change the status of this Finding by selecting **Not Reviewed**, **Corrected** or **Not Corrected**. Any additional notes you created for the finding during this follow up will also be associated with this Finding and will appear in this view.



Step	Action
28.	Click the **Home** button. You have successfully viewed and modified findings for a follow-up review. 
29.	**End of Procedure.**